



## **PROFESSIONAL BOUNDARIES POLICY (V2 June 2025)**

### **1 Introduction**

- 1.1 Transom Trust is committed to establishing and maintaining professional boundaries and practice between our residents and our staff and volunteers.
- 1.2 Staff and volunteers are encouraged to develop a wide range of appropriate and supportive relationships with our residents. Anyone representing Transom Trust is at all times responsible for establishing and maintaining the appropriate boundaries between themselves and our residents.

### **2 Aims**

- 2.1 This policy aims to:
  - define Transom Trust's approach to professional boundaries;
  - provide clarity on what is and is not acceptable in relation to professional boundaries;
  - create an awareness of how actions could be interpreted or discussed;
  - create an environment in which we protect the health, safety and welfare of our residents.

### **3 Scope**

- 3.1 This policy applies to all Transom Trust staff (full time, part time and temporary), trustees and our volunteers.

### **4 Principles of professional boundaries**

- 4.1 Professional boundaries are about establishing what is considered to be appropriate, safe and supportive behaviour between staff and volunteers, and residents.
- 4.2 Appropriate boundaries should first and foremost be discussed around the resident's needs. The purpose behind staff and volunteer behaviour must be to assist our residents, with no conflict of interest for staff and volunteers. Boundaries are based on mutual trust and respect and allow residents, and staff and volunteers, to engage in a professional, supportive relationship.
- 4.3 By clarifying what types of behaviours are appropriate, we safeguard residents and protect staff and volunteers from allegations of unprofessional conduct.
- 4.4 Staff and volunteers are expected to conduct themselves in a supportive and professional manner at all times, and to build and maintain impartial and effective relationships with all of our residents. Our staff and volunteers will ensure all residents are treated equally and will not offer a more favourable service to any resident over another. (For more information on equality issues – see para 10 below).

- 4.5 Transom Trust allow our staff and volunteers some discretion when it comes to their appropriate, safe and supportive relationship with our residents, and how that works out in practice. This discretion is subject to the staff and volunteers agreeing any related practice with the Chair of Trustees and the Operations Manager respectively. Examples of such discretion and “working out in practice” is set out in Transom Trust’s Lone Working policy (including the Green Pastures guidance referred to in that policy). This policy and procedure sets out - in more detail – the practice that staff and volunteers need to follow when supporting residents.

## **5 Maintaining Professional Boundaries**

- 5.1 Should a staff or volunteer find themselves in a position where a boundary line has or may have been crossed, this must be disclosed to the Chair of the Trustees and the Operations Manager respectively. A record will be kept of all disclosures received and any actions taken. The Trust will act on all disclosures as required.

## **6 Communications and Confidentiality**

- 6.1 Staff and volunteers must ensure any communications with residents is appropriate.
- 6.2 Staff and volunteers must only discuss confidential matters concerning Transom Trust colleagues, or residents directly involved in the matter, or external agencies, where required to do so.
- 6.3 Staff and volunteers must not discuss confidential or privileged information, obtained through their work, with friends, families, neighbours or other parties not involved or otherwise entitled to this information.
- 6.3 Staff and volunteers will ensure they respect resident confidentiality as appropriate, and will not discuss residents’ personal information except where required, and in accordance with data protection. Information may be shared where there are safeguarding issues, as Transom Trust is legally required to share the information, or have the resident’s consent. For more details on communication and confidentiality issues – see Transom Trust’s GDPR (including Confidentiality and Privacy) policy.
- 6.4 All social media issues are to be dealt with by the Operations Manager or the Chair of Trustees.
- 6.5 Subject to para 4.5 above (staff and volunteer discretion), staff and volunteers can share their mobile numbers and email addresses with residents.

## **7 Financial Affairs**

- 7.1 Staff and volunteers should not handle or manage a resident’s affairs, finances or valuables, including the collection of pensions/benefits, wills, or maintenance of financial accounts, without prior approval from the Chair of the Trustees and the Operations Manager respectively.
- 7.2 Staff and volunteers may:
- provide advice and guidance on managing finances in line with agreed support objectives or role responsibilities;

- subject to para 4.5 above, and/or act as an appointee for a resident's benefit matters (eg: Universal Credit). Transom Trust routinely act on a resident's behalf with all Housing Benefit issues.

## **8 Personal Benefit**

- 8.1 Staff and volunteers must not offer or receive gifts of money, personal valuables, services or gifts in kind.
- 8.2 However, from time to time the Trust, either in a personal or corporate capacity will give items to residents but will be something that is agreed on by the Chair of Trustees as something which will help the resident take additional steps towards independence.

## **9 Relationships**

- 9.1 Transom Trust's intention is to achieve a shared understanding of acceptable and unacceptable practice. Staff and volunteers must not embark on a romantic, physical or sexual relationship or friendship with a resident or allow behaviour to persist which compromises the professional relationship with the resident. Where a staff-member or volunteer believes a resident has a romantic interest in them, they must declare this to the Chair of Trustees and the Operations Manager respectively
- 9.2 There will be occasions when staff and volunteers will come into contact outside of the hours of formal support. In all instances, staff and volunteers should be sensitive to those circumstances, seeking not to be over-familiar (or too distant), but responding in an appropriate and caring way.
- 9.3 There will be occasions when staff or volunteers and residents know each other in a prior personal context. Staff and volunteers must declare this in the first instance to the Chair of Trustees and the Operations Manager respectively to avoid any personal breach or conflict of interest.

## **10 Equality and Diversity**

- 10.1 Transom Trust will ensure that this policy is applied fairly and consistently. We will not directly or indirectly discriminate against any person or group of people in line with the Trust's Equal Opportunities policy.
- 10.2 Transom Trust will act sensitively towards the diverse needs of individuals and communities and will take positive action where appropriate.

## **11 Training**

- 11.1 Transom Trust will provide all staff and volunteers responsible for implementing this policy with relevant, comprehensive training.

## **12 Monitoring**

- 12.1 Transom Trust will monitor the application of professional boundaries on an ongoing basis.

## **13 Review**

- 13.1 Transom Trust will formally review this policy every 2 years unless changes in legislation or regulation require an earlier review.

Review by Trustees: 19 June 2025

Next review date: 19 June 2027

Signature (on behalf of the Trustees): 