

Confidentiality & Boundaries Workbook for Peer Support Specialists

Introduction

Confidentiality and professional boundaries are **foundational principles** in peer support.

They build **trust, safety, and ethical integrity** in peer relationships. However, maintaining confidentiality and setting appropriate boundaries can sometimes present challenges.

This workbook is designed to provide peer support workers with **clear guidelines, ethical considerations, and practical exercises** to strengthen their approach to confidentiality and boundaries in their work.

Section 1: Understanding Confidentiality in Peer Support

What is Confidentiality?

Confidentiality refers to a peer worker's responsibility to **protect and respect the private information** shared by the individuals they support. It ensures that peers feel **safe to share openly** without fear of their personal information being disclosed.

◆ Key Aspects of Confidentiality in Peer Support:

- Peer workers must not share a peer's personal information without their consent.
- Confidentiality builds trust and strengthens the peer relationship.
- There are **exceptions** to confidentiality when safety is a concern.

◆ When Confidentiality Can Be Broken:

- If a peer expresses **intent to harm themselves or others**.
- If there is **suspected abuse or neglect of a minor or vulnerable adult** (mandatory reporting laws).
- If a **court order or legal requirement** demands disclosure.
- If an organization's policy requires **specific reporting procedures**.

Confidentiality Scenarios: What Would You Do?

Read each scenario and reflect on how you would handle the situation ethically.

Scenario 1:

A peer confides in you that they are considering leaving their medication-assisted treatment program but don't want anyone to know. They fear being judged by their provider. How do you respond while respecting confidentiality but also ensuring ethical support?

Scenario 2:

During a group meeting, one peer shares personal information about another peer without permission. How do you handle this situation to reinforce confidentiality while maintaining group trust?

Discussion Questions:

1. What ethical principles apply in these situations?
2. What are the risks of violating confidentiality?
3. How can you navigate these challenges while remaining supportive?

Section 2: Setting and Maintaining Professional Boundaries

Why Are Boundaries Important?

Professional boundaries define **what is appropriate and ethical** in a peer support relationship. Boundaries help prevent **burnout, role confusion, and ethical dilemmas**. They also ensure that peer support workers remain **effective, professional, and objective** in their roles.

Common Types of Boundaries in Peer Support:

- **Emotional Boundaries** – Avoiding personal overinvestment while maintaining compassionate support.
- **Physical Boundaries** – Respecting personal space and appropriate physical interactions.
- **Time Boundaries** – Ensuring professional availability without overextending.
- **Digital Boundaries** – Managing online interactions and social media ethics.

ADVOCATE. ACT. ADVANCE.

Common Boundary Challenges & How to Navigate Them

Scenario 1: Dual Relationships

You are paired to support someone who was previously a close friend. The peer assumes your relationship will remain the same as before. How do you establish a new professional boundary while maintaining rapport?

Scenario 2: Requests for Personal Favors

A peer asks you to lend them money for food or transportation. You empathize with their situation but are concerned about crossing ethical boundaries. What is the best approach to handle this request?

Scenario 3: Social Media & Digital Boundaries

A peer you support sends you a friend request on social media and frequently messages you outside of work hours. What are the risks, and how do you set appropriate digital boundaries?

✓ Discussion Questions:

1. What are the ethical risks in these scenarios?
2. How can you reinforce professional boundaries while maintaining trust?
3. What resources or strategies can you use to prevent boundary challenges before they arise?

Section 3: Applying Ethical Practices in Peer Support

Confidentiality & Boundaries Self-Assessment

Instructions: Reflect on your experiences and rate yourself on a scale from 1 (Rarely) to 5 (Always).

1. I clearly explain confidentiality and its limits to the peers I support.
2. I seek supervision when I face ethical dilemmas regarding confidentiality.
3. I avoid disclosing peer information unless required for safety reasons.
4. I maintain emotional boundaries and avoid taking on a peer's challenges as my own.
5. I ensure my interactions with peers remain professional and within ethical guidelines.
6. I regularly reflect on my boundary-setting skills and adjust when necessary.
7. I reinforce confidentiality and professionalism in all my peer relationships.

☒ **Review Your Responses:** Scores below 4 in any category may indicate areas for growth. Consider discussing these areas with a supervisor or engaging in further training.

Recommended Professional Growth & Training

If your self-assessment scores are **4 or below**, consider engaging in the following development opportunities:

- **Confidentiality & Ethics Training:** Learn about confidentiality laws, peer support ethical codes, and best practices for information protection.
- **Boundary-Setting Workshops:** Practice handling real-life scenarios involving peer-worker boundaries.
- **Supervision & Peer Consultation:** Discuss ethical challenges with experienced professionals for guidance.
- **Trauma-Informed Care Training:** Enhance awareness of emotional boundaries while supporting peers with lived experiences of trauma.
- **Self-Care & Burnout Prevention Courses:** Strengthen personal wellness strategies to maintain effective peer support relationships.

Supervisor & Peer Discussion Prompts

- What are some of the **biggest challenges** you've faced in maintaining **confidentiality**?
- How do you **reinforce healthy boundaries** in difficult situations?
- What **strategies** have helped you manage emotional boundaries in peer support work?

Section 4: Confidentiality & Boundaries Best Practices

◆ Practical Strategies for Confidentiality:

- Always explain confidentiality **at the start** of peer relationships.
- Be transparent about **when confidentiality must be broken** for safety reasons.
- Store peer information securely if documentation is required.
- Seek supervision when uncertain about **confidentiality-related decisions**.

◆ Practical Strategies for Boundaries:

- Set clear **expectations** for communication and availability.
- Politely decline personal invitations while **affirming your commitment** to peer support.
- Use **neutral language** when discussing personal opinions or experiences.
- Engage in **ongoing boundary reflection and self-care** to prevent burnout.

Conclusion & Next Steps

Maintaining confidentiality and professional boundaries in peer support ensures **ethical integrity, trust, and long-term success**. As you continue in your role, use this workbook as a reference and engage in **supervision, training, and peer discussions** to strengthen your ethical skills.

Additional Resources:

- **Confidentiality & Professionalism Guide**
- **Ethical Boundaries Handbook for Peer Workers**
- **Case Study Workbook: Navigating Boundaries & Confidentiality**

Next Step: Review your self-assessment and set one goal for strengthening confidentiality or boundary-setting in your peer work.