Module 6: Tips for Setting Healthy and Safe Boundaries to Reduce Stress

Caring for Yourself While Caring for Others

TRAINER’S GUIDE

Practical Tips for Homecare Workers

STAY SAFE AT WORK

DEPARTMENT OF HEALTH AND HUMAN SERVICES
Centers for Disease Control and Prevention
National Institute for Occupational Safety and Health
Module 6: Tips for Setting Healthy and Safe Boundaries to Reduce Stress
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November 2014

Safer • Healthier • People™
Module 6: Tips for Setting Healthy and Safe Boundaries to Reduce Stress

Learning Objectives:
By the end of this training, participants will be able to do the following:

- Describe what causes stress in their work lives.
- Define the many impacts of stress.
- Outline strategies for handling and reducing stress.
- Explain the safe and healthy boundaries needed between homecare workers and their clients.

Workshop at a Glance

<table>
<thead>
<tr>
<th>Activity</th>
<th>Time</th>
<th>Materials</th>
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<tr>
<td>1. Welcome and Introductions—How Stressed Do You Get When...</td>
<td>30 minutes</td>
<td>Handouts, PowerPoint slides, signs</td>
</tr>
<tr>
<td>2. Understanding the Effects of Stress</td>
<td>30 minutes</td>
<td>Prepared flip chart pages, PowerPoint slides</td>
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<tr>
<td>3. Tips and Strategies for Managing Stress</td>
<td>40 minutes</td>
<td>Handouts, PowerPoint slides</td>
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<tr>
<td>4. Setting Healthy and Safe Boundaries</td>
<td>20 minutes</td>
<td>Handouts, PowerPoint slides</td>
</tr>
<tr>
<td>Total Time</td>
<td>2 hours</td>
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Preparing to Teach:

1. **Review the trainer’s guide and background materials, and prepare to present.**

   *Read background information* to support your presentation. This workshop complements and reflects the information provided in these sources:

   Homecare Workers’ Handbook: *Caring for Yourself While Caring for Others*—We hope that you will share copies of this booklet, which is designed as a reference for workers in the field, and will reinforce the lessons in this training with all participants.

   NIOSH Hazard Review: “Occupational Hazards and Home Health Care”—This gives extensive technical information for professionals and agencies, including information to guide agencies in their efforts to ensure safe and healthy practices.
   http://www.cdc.gov/niosh/docs/2010-125

   You may also want to read the following resources:


   http://apps.state.or.us/Forms/Served/de9062.pdf

   **Instructions** for conducting training are in the “Detailed Lesson Plan” in black.

**Tips for Trainers** are in shaded boxes.

Please note that the emphasis is on creating a positive, welcoming, and safe environment for dialogue. Focus on encouraging participation and affirming the contributions of participants to the discussion. Thank participants for their role as homecare workers and for their dedication.

A risk when teaching health and safety is to “blame the workers” for not upholding the safest practices. In fact, there are external pressures, circumstances, and environmental factors that can challenge them and undermine their health and safety. The goal of this course is to empower workers to identify the risks they may face on the job, determine if there are any needed tools or equipment, and engage their clients, agencies, and employers to work with them to address concerns and develop effective strategies for making changes.

As well as using these tips, we urge you to identify personal examples related to each of the topics to prepare you to encourage discussion and model the contributions you hope to receive.
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Suggested scripts are in **purple**. As you become more familiar with the workshop, feel free to use your own words to convey the key points.

**Class size matters!** Activities are designed for groups of 8–14 participants to best engage each individual. If you are presenting to larger groups, you will need to adapt some activities, and participants will have less time to contribute to discussions. Big classes also lengthen the times needed for activities and modules.

2. **Place handouts (1 packet for every participant) at each seat before the workshop, and include an evaluation form.**

   Distribute printed copies of the PowerPoint show at the end of the workshop. (It may be printed 2, 3, or 6 slides per page.)

3. **Prepare flip chart pages in advance:**
   - Activity 2—How Does Stress Affect Your Body?
   - Activity 2—How Does Stress Affect Your Thoughts and Emotions?
   - Activity 2—How Does Stress Affect Your Behavior and Interactions?

4. **Bring the following supplies:**
   - Copies of the signs for Activity 1. See back pages of this trainer’s guide.
   - A package of pens for participants.
   - An easel and flip chart paper.
   - Laptop computer, LCD projector, and screen.
   - Markers.
   - Painter’s or masking tape.

5. **Make sure your room is ready:**
   - Set up chairs and tables in a square or U shape so all participants can see one another. Using round tables with four participants each is an alternative, but not as likely to encourage engaged attention to full-group discussions.
   - Have refreshments ready, if applicable.
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- Arrange for AV equipment, and set the PowerPoint to the title page before class.
- Set up the easel with the prepared flip chart pages at the front of the room.
- Unless you are using sticky flip chart pages, it’s helpful to put some short pieces of tape along the easel to use during the training.
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Detailed Lesson Plan

Activity 1: Welcome and Introductory Activity: How Stressed Do You Get When ...

Materials: Handouts, PowerPoint slides, signs
Time required: 30 minutes

1. Welcome participants to the workshop (3 minutes).

Display the title slide of the PowerPoint, read the workshop title, and mention the host of the program. Introduce yourself, display slide 2 of the PowerPoint, and play the short video. Then review the purpose of the workshop as listed in the session goals on slide 3.

Say:

“Hello! This is the workshop Caring for Yourself While Caring for Others—Tips for Setting Healthy and Safe Boundaries to Reduce Stress. My name is ___________.

“It’s a pleasure to be here with you and have the chance to discuss your health and safety as you provide care, support, and services to clients. We know that you do a lot of hard work, and we want you to be as safe as possible and not experience emotional and mental stress.

“Here are our goals on this slide. We want you to be able to:

• “Describe what causes stress in your work lives.
• “Define the many aspects of stress.
• “Outline strategies for handling and reducing stress.
• “Explain the safe and healthy boundaries needed between you and your clients.

“Although the session is designed for you as homecare workers, we believe this information can be important for clients, also. We encourage you to share what you learn with them and with their families and other caregivers.

Tips for Trainers

Your approach to this introduction sets the tone for the entire workshop!

Speak warmly and enthusiastically to convey:

• The importance of the information to be covered.
• Your real concern for workers’ well-being.
• Your belief that participants intend to do their jobs well while protecting the health and safety of themselves and their clients.
“Each of you has a packet of handouts with space for taking notes. Please do not look ahead in the packet. I’d appreciate your focusing on the work we’re doing now. At the end of the workshop, I’ll also distribute copies of the slides we’ll be seeing, so you will have that information, as well.

“Are there any questions before we move into our first activity?”

2. **Set up a line for large-group activity (2 minutes).**

   Show slide 4

   **Say:**

   “We’re now going to do an activity to explore what stresses you in your work lives. If you look along the wall, you’ll see that I’ve posted five signs, ranging from ‘Not at all stressed’ to ‘A bit stressed,’ ‘Somewhat stressed,’ ‘Quite a bit stressed,’ and ‘Very stressed.’ Think of them as a spectrum as they appear on this slide. I am going to give you a series of scenarios and ask you to indicate how much stress you would feel if you were experiencing the circumstances described. Please stand near the sign that most closely matches how stressed you think you would feel. Then, before the first time you explain why you chose to stand where you did, I’ll ask each of you to introduce yourself and explain why you would feel that level of stress.

   “Before we begin, it’s important to remember that different things cause stress for some people and not others. That’s normal, and no one is right or wrong about what should or shouldn’t stress them. People interpret similar situations differently, and they have different skills and resources to bring to them. Becoming aware of what does stress us is what is important. It is the first step we can take to develop strategies for reducing stress in our lives.

   “Are the directions clear? OK! First, please stand and spread out along the wall, however you like. Stand anywhere you’d like—don’t worry about the signs for now.”

   Answer any questions participants may have and help them organize themselves along the wall.
3. Conduct large group activity (15 minutes).

Once participants are in place, begin by reading the first scenario on page 2 in their handouts. Then ask everyone to go to the stress levels sign that best reflects how they would feel if they were the person in the scenario. Once participants have settled into their positions, ask for a volunteer at the highest level of the spectrum to introduce him or herself and explain why he or she would feel that level of stress. Then, invite others to share their own points of view. Validate the reasonableness of each point of view and affirm that the differences are a natural reflection of everyone’s different backgrounds, temperaments, and lives. Emphasize that you just want each person to consider what stresses him or her and to gain perspective from hearing one another.

After a short discussion of the first scenario, read the second and repeat the process. Continue through all of the scenarios as time allows, but end discussion after 20 minutes. Feel free to go out of order and choose those that seem most important for your organization. Ask participants to take their seats.

4. Facilitate discussion about the activity (9 minutes).

Ask participants the following questions and facilitate discussion:

- “What surprised you in our discussion, as everyone shared their thoughts on the scenarios?”
- “Are there other common scenarios that cause stress for homecare workers?”
- “What did you learn about the level of stress you experience in your work life?”

5. Wrap up the activity (1 minute).

Thank everyone for their openness to sharing what stresses them and for their thoughtful contributions to the discussion. Note how everyone does have stress in their lives—and how everyone tries to manage it and keep on doing all that they have to do. Highlight how differently and to what degree each person is affected by different stressors. This suggests how important it is for each person to become aware of his or her own stressors. Say that the next topic is going to be how stress tends to affect people when it is constant in their lives.
Activity 2: Understanding the Effects of Stress

Materials: Prepared flip chart pages, PowerPoint slides
Time required: 30 minutes

1. Introduce the discussion about the impact of stress (3 minutes).

Show slides 5 and 6, explaining that when stress persists over time, it can become a health problem, causing all the impacts outlined on slide 7.

2. Set up large-group activity (2 minutes).

Say:

“To continue exploring how stress impacts us, as a large group we’re going to come up with a lot of ideas. Around the room there are three flip chart pages posted. One page is titled, ‘How does stress affect your body?’ For example, many people report that they get headaches when they’re too stressed. The second page is, ‘How does stress affect your thoughts and emotions?’ A person might feel anxious because of the issue they’re stressed about. The third page is, ‘How does stress affect how you behave and your interactions with others?’ One idea might be that we get tense and curt with people, so interactions don’t go well.

“I’d like us to count off the numbers 1, 2, and 3, one by one, and then start again. Group 1 will start at the ‘body’ flip chart, Group 2 will start at the ‘thoughts and emotions’ flip chart, and Group 3 will begin at the ‘behaviors and interactions’ page. You won’t have much time, so have someone pick up the marker by the flip chart and start recording all the ideas everyone can think of as quickly as possible.”
3. Conduct large-group activity (15 minutes).

Have participants count off, and help them get set up at the three flip charts pages and start listing effects of stress. Answer questions and offer support as necessary. Allow 5 minutes for the first idea session, then stop and call everyone to give their attention to you.

**Say:**

“OK! Great job. Now, please move clockwise to the next flip chart. Your job is to review what the first group has written and add any other ideas you can think of. Go!”

Help participants as they move and start their work. Answer questions and give support as needed. Allow 3 minutes for this round, and repeat the instructions above so that they move to the last of the flip chart pages, reviewing the items on them, and adding their own. Allow another 3 minutes for this round. At 3 minutes, thank everyone and ask them to take their seats.

**Say:**

“Thanks for your good work. Let’s review what you’ve written. On page 3 of your handouts, there is room for you to take notes, along with a list of responses that many people have given to these questions.”
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4. Debrief large-group activity (9 minutes).
   Taking copies of page 3 of the handouts with you, quickly review what’s been written at each of the charts, highlighting other items on the handout page, and all the other points participants have listed. Clarify any points you or participants do not understand.

5. Wrap up activity (1 minute).
   Thank participants for their great contributions to the discussion. Wrap up the discussion by emphasizing how difficult stress can be, and how damaging its impact can be in our lives. Note that, if we don’t properly manage stress, it can lead us to act in ways that actually increase our stress and troubles—for instance, when it makes us have trouble concentrating on our work or we snap at our clients or others in our lives. That’s why it’s so important to have strategies for managing stress, which is our next topic.
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STAY SAFE AT WORK  Practical Tips for Homecare Workers

Activity 3: Tips and Strategies for Managing Stress

Materials: Participant handouts, PowerPoint
Time required: 40 minutes

1. Introduce the pair activity (5 minutes).

Show slide 8 and refer to it as you speak. Have participants turn to page 4 in their handout.

Say:

“Our next activity will give you a chance to think through what healthy and safe boundaries you need to set and uphold with your clients. Because you are working in a client’s home, sometimes the boundary between being a paid worker and being a companion can get blurred. Recognizing these boundaries can reduce your risk of stress and job loss, and often it will reduce the clients’ stress levels as well. You’ll see that reducing stress—and health and safety risks—involves respecting these boundaries and taking initiative and speaking up.

“I’d like you to pair up with the person sitting next to you for this activity. I’m giving each pair one scenario. Your job for the next 5 minutes is to read the three versions of the scenario that you are assigned, and rank them from 1 to 3. A ‘1’ ranking means you think the scenario shows healthy and safe boundary setting. A ‘2’ ranking means that scenario illustrates less safe and healthy boundary setting. A ‘3’ means you think the scenario depicts unsafe and unhealthy boundary setting. Explain to each other why you’re making the choices you do. Let’s do the first scenario together as an example.”

Read scenarios 1a, 1b, and 1c (or the scenario you select to use as an example). Invite participants to rank the scenarios and discuss their choices and ideas. Encourage participants

Tips for Trainers

Review the scenarios and the answer sheet at the end of this trainer’s guide before class.
Choose the scenario you prefer to use as an example and the scenarios you want to use in the activity. Up to six pairs can each have a different scenario.
You may want to assign a different scenario to each pair, or give the same scenario to two different pairs and compare their thoughts in the discussion.
not to get too caught up in the details, such as how some homecare workers might not have the option of a friend. They should focus on what they think the best way to handle the scenario would be.

If the discussion doesn’t raise these points, note that in Option 1a Beverly took her son to work. It was a quick solution to the immediate problem, but it could expose Darren or Mrs. Carmody to illness or tension. It could also endanger her job, because taking children to work is usually against the rules. Plus, a day trying to get her work done while keeping Darren happy and busy would be stressful in its own way! In Option 1b, she took the initiative to arrange for her friend to come get Darren, but still took the risk of him coming to work with her. In Option 1c, she was assertive enough to call Mrs. Carmody so that she didn’t have to bring Darren to work.

**Ask:**

“Are the instructions clear?”

Answer any questions, and give each pair of participants the scenario they are to discuss. Ask them to begin immediately and work for the next 5 minutes.

**2. Conduct pair activity (5 minutes).**

Circulate among the pairs, offering help and answering questions as necessary. When 4 minutes have passed, give everyone a 1-minute warning. Allow an extra minute or two if the pairs need more time. When the time is up, ask for everyone to give their attention back to the full group.

**3. Facilitate pair reports and discussion (20 minutes).**

Ask for a pair to volunteer to go first, and then ask them to read all three versions of their scenario, share their rankings after, and then present their thoughts on their choices. Affirm that their choices are correct, or very respectfully explain why the rankings may be different than what they thought. See the answer sheet at back of this trainer’s guide.

Acknowledge that the choices aren’t always clear and easy for homecare workers, and upholding healthy and safe boundaries won’t always seem like the easiest—or even the nicest—thing to do.

You may explain the “slippery slope” theory, which suggests that once a person begins down a dangerous path, it’s hard to stop. Things become more difficult, and it is harder to turn
back the farther you go. For example, this can be true about giving clients a little bit of extra unpaid time—they can come to expect more and more of you. It’s also true in the case of sharing personal troubles with clients. Not only might they become stressed worrying about you—it can lead them to want to give you money or gifts, and that’s dangerous. That’s why clear boundaries are so important. You may, out of trying to give your all, do a task in an unhealthy or unsafe way, and end up hurting yourself or the client. That may cause trouble for both of you.

Repeat the process as time allows or until all the scenarios have been discussed.

4. Review the healthy boundary guidelines (10 minutes).

Review the guidelines on slides 9 and 10. They are presented to reflect the lessons from each of the scenarios. Discuss any comments participants may have. Discuss how maintaining good boundaries involves both their work and their relationships with the client and employer. Emphasize the importance of learning to speak up. Sometimes, workers don’t feel confident and comfortable about speaking up to address issues with their supervisors or clients. And yet, tolerating known risks and other concerns adds to a person’s stress, and becoming hurt, sick, or injured from one of the risks can add enormous difficulty and related stress to a worker’s life. Show slide 11 and explain that being assertive involves taking action and initiative to find and carry out solutions that will reduce stress in the long run. It involves speaking up to address issues with others. Although it can be hard to speak up, there are strategies to make it easier. These include suggesting specific solutions to problems, choosing the one or two things that are most important to you, and getting help from others when you can.
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Activity 4: Setting Healthy and Safe Boundaries

Materials: Participant handouts, PowerPoint slides
Time required: 20 minutes

1. Introduce personal tips and strategies for managing stress (4 minutes).

Show slide 12.

Say:

“Although it is important to change the parts of your job that cause stress, no one’s work life is totally free from stress. So, it’s important to know strategies for handling stress. Slide 12 has a list of strategies and tips for managing stress in your lives. My guess is that most of you have heard of these. And yet, we often don’t actually do them. So I’m going to ask a volunteer to present each of these tips. Then I’ll ask the volunteer to give examples for how to successfully do this in our lives, and strategies that have worked in his or her own life. Then we’ll open up discussion of each one and see if we can share great ideas for how to use these strategies and tips in our lives. They are listed on page 7 of your handouts, and you can take notes there. Would someone like to begin with an example of exercise you’ve built into your life and strategies that help you keep at it?”

2. Facilitate discussion of the strategies and tips (10 minutes).

After the volunteer has begun, ask if others would like to share examples of exercises they’ve found that work for them, and how they stick to doing them, despite time and other pressures in their lives. Discuss for a minute or two, and then ask for a volunteer to discuss eating well and nutritiously. Repeat the process for each of the strategies. Add examples from your own experience or from the list below.

Exercise

Walk your dog every day, get a friend to exercise with you, join a gym, dance, do yoga, set up a space at home that makes it easy to exercise, follow exercise videos.
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<tr>
<th><strong>Tip</strong></th>
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<tr>
<td>Eat well and nutritiously</td>
<td>Join a weight loss group, watch the cooking channel, make meals more of a family time, buy fresh fruit and vegetables, and stop eating at fast food restaurants.</td>
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<tr>
<td>Talk with a friend or counselor</td>
<td>Go for regular walks together with a friend or family member.</td>
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<tr>
<td>Get enough sleep</td>
<td>Don’t eat or drink within a couple hours of bedtime, drink chamomile tea, try aromatherapy, change your mattress and pillows, listen to music.</td>
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<tr>
<td>Keep up-to-date on vaccinations, such as flu shots</td>
<td>Go to the local drug store.</td>
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<tr>
<td>Avoid alcohol, drugs, caffeine</td>
<td>Set a daily limit, try deep breathing exercises or meditation, join support groups, try decaffeinated alternatives.</td>
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<tr>
<td>Make time each day to relax, laugh, and reflect</td>
<td>Get up a half-hour before others to make private time, use visualizations and self-talk to give yourself peace, keep a journal, read books that give perspective and comfort, pray, listen to soothing or relaxing music, take a bath, see enjoyable movies or other entertainment.</td>
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#### 3. Invite participants to identify additional strategies and tips (5 minutes).

Ask participants to speak of any other stress relievers they have found helpful in their lives, and discuss. Note that there is space to add them on page 7 of their handout.

#### 4. Conclude the workshop (1 minute).

Thank the participants for their great participation throughout the workshop and for their commitment to doing the best they can for their clients, while taking good care of themselves, too. Distribute copies of the slide show. Offer your hope that the session has been helpful to them and wish them the best in their future work. Offer any additional assistance you have available, and give details of any additional sessions you plan to offer.
Not very stressed
A bit stressed
Somewhat stressed
Quite stressed
Very stressed
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Setting Healthy and Safe Boundaries at Work

Scenarios are ranked from 1 to 3.

(1) = This is healthy and safe boundary setting.
(2) = This is less safe and healthy boundary setting.
(3) = This is unsafe and unhealthy.

*The homecare worker is identified by an asterisk in each scenario.

1. Beverly* learns her son has no school at the last minute.

(3)—1a. Beverly brings him to her shift at Mrs. Carmody's.
(2)—1b. Beverly brings him to Mrs. Carmody's, and she asks her friend to pick him up.
(1)—1c. Beverly gets her friend to watch him and calls to let Mrs. Carmody know she'll be late.

2. It’s impossible for Anita* to do everything Mrs. Griggs needs in the time scheduled.

(3)—2a. Anita works extra unpaid hours to help her out.
(1)—2b. Anita prioritizes work with Mrs. Griggs and reports unmet needs to her supervisor.
(2)—2c. Anita stretches her time whenever she can—coming a bit early and staying a bit late.

Discussion points—Many homecare workers feel compelled to work additional unpaid time when their clients need more than is allotted for in the homecare budget. Yet, working unpaid time can cause physical and psychological stress for the workers, lead to tensions with their families, and create conflicts with other paid opportunities for work. It can feel best to stretch time a little, but doing so can lead clients and families to expect more from the homecare workers, and it is harder to keep boundaries once they have been crossed.

3. Mr. Christos can’t afford a Hoyer lift to help move him.

(2)—3a. Byron* asks his son to help him with transfers. It’s still challenging and straining.
(3)—3b. Byron helps him with transfers despite his weight, and Byron feels back strain.
(1)—3c. Byron has explained about using a gait belt, and Mr. Christos’ son has bought one, and Byron uses it for transfers. It seems to work well.

Discussion points—Clients frequently lack the tools homecare workers need to do their jobs safely. It’s important for workers to speak up, explore options, and tell their clients and their families of best practices and try to reach a resolution.
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4. **Ms. Collins loves hearing about Debra’s children, and Debra* enjoys telling her stories.**

(1)—4a. Debra makes a point of sharing only the highlights.
(3)—4b. Debra tells how she couldn’t afford an outfit for her daughter’s gym tournament and Ms. Collins insists on giving Debra $100.
(2)—4c. Debra discusses what worries her about her kids, and she values Ms. Collins’ advice.

Discussion points—Clients and their homecare workers can come to know one another well and care about each other greatly. Clients may be willing and sympathetic listeners, and so it can be tempting for workers to share their personal problems and needs with them. This is dangerous for many reasons. Because clients depend on workers, they may listen even if they don’t want to hear everything the homeworker says. Workers should be careful not to let this happen. Clients may also become worried and burdened by what they know about workers’ lives, and this can cause them stress. Finally, sharing personal problems can lead clients to want to help—with gifts, with money, or in other ways—and that is beyond healthy boundaries. It could even lead to the worker being fired. This is an example of stress leading to behavior that can lead to additional stress—it’s an example of why it is so important to draw upon the personal tips and strategies to lessen stress.

5. **Tim* works with Mrs. Herrick, who is angry and frustrated. She lashes out at Tim daily, calling him names and finding ways to criticize and belittle him.**

(3)—5a. Tim tries to stay calm, but after a while, he loses his cool with her and yells back.
(2)—5b. Tim stays calm and kind with Mrs. Herrick, but is experiencing stress at home.
(1)—5c. Tim tells Mrs. Herrick that he doesn’t like her language or the negative way she speaks about him and to him. He says he will not continue working this way, and he asks her what they could do to help her feel less angry and unhappy.

Discussion points—Sometimes pride can cause us take us on more stress than we can manage. Workers want to be able to handle the challenges they face, but it’s important to know what is stressing us and not continue in circumstances that damage our well-being. We need to speak up and explore options with others.
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*The homecare worker is identified by an asterisk in each scenario.

6. Maria* is a life-saver to Peter and Jo Delaney, who are living with Jo’s mother, Agnes, who has advanced dementia.

(1)—6a. Marla encouraged Peter and Jo to contact the American Alzheimer’s Society. They go to support groups.
(3)—6b. Maria gave Peter and Jo her cell phone number so they can call her at any time.
(2)—6c. Maria listens to Peter and Jo, and she offers them comfort after her shifts.

Discussion notes—Homecare workers are kind and giving people, and they care about their clients. However, if clients can call workers anytime and come to rely on workers for more than they are paid for, it can cause stress for homecare workers and their families and friends.

7. Mrs. Dolan needs open wound care, which Felicia* has never done before.

(3)—7a. Felicia goes ahead and does it.
(1)—7b. Felicia admits her inexperience and asks Mrs. Dolan’s daughter to give her step-by-step instructions.
(2)—7c. Felicia explains that she wants Mrs. Dolan’s daughter to show her exactly the way she wants it done.

Discussion notes—Workers should never provide care they have not been trained in and do not feel confident they have the skills to do safely. It can be hard to admit lack of experience or ignorance, but in the long run, this will ensure workers’ own safety and build the most trusting and positive relationships with clients and their families. Workers need to speak up!