



Professional Boundaries Policy

Version: 2.0

Policy Owner: Andy Robinson, Director

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1. Purpose

Professional boundaries are essential to creating safe, ethical and effective coaching relationships.

This policy sets out how Insight2Excellence establishes and maintains appropriate professional boundaries with clients, prospective clients, former clients, families, carers, partner organisations and other professionals.

Healthy boundaries protect:

- clients;
- the coach;
- coaching relationships;
- professional integrity;
- public confidence; and
- the reputation of Insight2Excellence.

Professional boundaries are not barriers to compassion. They create the conditions in which trust, safety, authenticity and effective coaching can flourish.

2. Scope

This policy applies to all coaching services delivered by Insight2Excellence, including coaching undertaken:

- online;

- by telephone;
- in clients' homes;
- in workplaces;
- in community settings; and
- in hired coaching or meeting rooms.

It applies to interactions during coaching sessions and to relevant interactions outside sessions, including:

- email;
- telephone calls;
- text or messaging services;
- social media;
- online communities;
- gifts and hospitality;
- financial arrangements;
- referrals;
- professional networking; and
- contact after the coaching relationship has ended.

Although Insight2Excellence currently consists of a sole practitioner, this policy will apply equally to any future associate coaches, employees or representatives.

3. Principles

Insight2Excellence is committed to coaching relationships that are:

- respectful;
- transparent;
- person-centred;
- collaborative;
- inclusive;
- ethical; and
- professionally accountable.

The coaching relationship exists for the benefit of the client.

The coach will not use the professional relationship for personal, emotional, sexual, financial, commercial or social advantage.

The coach will maintain appropriate boundaries while also recognising that warmth, humour, empathy, authenticity and genuine human connection can be important elements of effective coaching.

Boundaries will be applied thoughtfully and with sensitivity to individual circumstances, culture, disability, neurodiversity and other relevant differences.

4. The Nature of the Coaching Relationship

A coaching relationship is a professional relationship.

Whilst warmth, empathy, authenticity and genuine care are fundamental to effective coaching, coaching is distinct from:

- friendship;
- counselling;
- psychotherapy or therapy;
- medical intervention;
- mentoring, unless explicitly contracted;
- advocacy;
- social work;
- family support; and
- emergency or crisis intervention.

The coach's role is to facilitate reflection, insight, learning, self-awareness and personal growth within agreed coaching objectives and within the coach's professional competence.

Where a client's needs fall outside the appropriate scope of coaching, the coach will discuss this with the client and, where appropriate, recommend other sources of support or referral.

5. Professional Behaviour

The coach will:

- behave honestly and respectfully;
- communicate clearly and appropriately;
- act with integrity;
- maintain appropriate boundaries;
- avoid exploitation;
- respect diversity and individual difference;
- avoid discriminatory behaviour;

- recognise the limits of professional competence;
- maintain appropriate professional standards in person and online;
- seek supervision or appropriate professional advice when ethical dilemmas arise; and
- take responsibility for the impact of professional decisions and actions.

The coach will not knowingly encourage, assist or participate in dishonest, unlawful, discriminatory or professionally inappropriate behaviour.

6. Dual Relationships

A dual relationship exists where the coach and client have another significant relationship in addition to the coaching relationship.

Examples may include:

- close friendship;
- family relationships;
- former intimate or romantic relationships;
- current employment relationships;
- significant financial relationships;
- business partnerships;
- close social relationships; or
- other relationships that could reasonably affect professional judgement.

Dual relationships should generally be avoided where they could compromise objectivity, professional judgement, client welfare or the integrity of the coaching relationship.

Where a potential dual relationship cannot reasonably be avoided, the coach will consider:

- the nature of the relationship;
- potential risks;
- conflicts of interest;
- the client's interests;
- professional boundaries;
- whether the arrangement can be managed safely and ethically; and
- whether independent supervision or advice is appropriate.

Where the relationship presents an unacceptable conflict of interest, coaching will not proceed or will be brought to an appropriate end.

7. Romantic and Sexual Boundaries

The coach will not pursue or engage in a romantic or sexual relationship with a current coaching client.

Sexualised communication, flirtation or behaviour that could exploit, pressure, manipulate or reasonably be experienced as inappropriate by a client is not acceptable.

The coach will maintain appropriate boundaries in relation to:

- physical contact;
- language;
- humour;
- personal disclosure;
- digital communication;
- social media; and
- other forms of interaction.

The existence of attraction or personal feelings does not remove the coach's professional responsibility to maintain appropriate boundaries.

Where circumstances create a significant boundary concern, the coach will seek supervision and consider whether coaching should continue.

8. Former Clients

Professional responsibilities do not automatically end when coaching ends.

The coach will continue to:

- respect confidentiality;
- protect personal information;
- avoid exploitation of the previous professional relationship;
- avoid using knowledge gained through coaching for personal or commercial advantage; and
- consider whether any future relationship could reasonably create a conflict of interest or harm the former client.

Where a proposed post-coaching relationship could compromise professional integrity or exploit the previous relationship, the coach will decline or manage the relationship appropriately.

9. Contact Outside Coaching Sessions

Reasonable communication between sessions may include:

- arranging or changing appointments;
- confirming bookings;
- administrative queries;
- sharing agreed resources;
- agreed coaching-related communication;
- safeguarding matters; and
- other matters expressly agreed as part of the coaching arrangement.

The coach does not provide an emergency response service.

Clients should not rely on email, text, social media or other routine communication channels for urgent or emergency support.

Where urgent or emergency support is required, the client will be signposted to appropriate emergency, crisis or healthcare services.

The coach will aim to maintain appropriate response expectations and will not be expected to provide continuous or out-of-hours availability unless this has been expressly agreed.

10. Personal Disclosure

Appropriate personal disclosure may occasionally support authenticity, connection or learning within coaching.

However, personal disclosure will be considered carefully and should serve a clear coaching purpose rather than meeting the coach's personal emotional needs.

The coach will avoid placing responsibility for the coach's emotional wellbeing onto a client.

The client is not responsible for providing friendship, emotional support or personal reassurance to the coach.

11. Social Media and Digital Boundaries

Professional and personal online boundaries are important.

Insight2Excellence will not normally:

- accept personal social-media friend or connection requests from current clients where doing so would blur professional boundaries;
- engage in public discussions about individual coaching relationships;
- identify clients publicly without appropriate consent;
- discuss identifiable coaching content online; or
- use personal social-media channels as an alternative to agreed professional communication.

Professional social-media accounts may be used to share educational, professional or promotional content.

Clients remain free to follow or engage with public professional content. Such interaction does not create an expectation of a coaching relationship or of confidential communication through social media.

If a client communicates something sensitive through a public or inappropriate channel, the coach may move the communication to a more appropriate private channel.

12. Testimonials, Reviews and Public References

Clients will not be identified publicly in connection with their coaching without appropriate consent.

Where testimonials, reviews, photographs, case studies, quotations or other client-related material are used for promotional purposes, Insight2Excellence will seek appropriate permission before publication.

A client will never be pressured to provide a testimonial or positive review.

Consent to a testimonial or public reference will not affect the client's access to coaching.

13. Gifts and Hospitality

Small, low-value expressions of appreciation may occasionally be accepted where refusal would reasonably cause offence and accepting the gift does not create a boundary concern.

The coach will consider:

- the value and nature of the gift;
- the client's circumstances;
- whether accepting it could create an obligation;
- whether it could influence professional judgement;
- whether it could reasonably be perceived as inappropriate; and
- whether accepting it could affect the coaching relationship.

The coach will not accept:

- cash gifts;
- expensive or disproportionate gifts;
- gifts intended to influence professional decisions; or
- gifts that create a significant conflict of interest.

Repeated or increasingly valuable gifts may indicate a boundary concern and will be addressed appropriately.

Hospitality will be considered using the same principles of proportionality, transparency and professional integrity.

14. Physical Contact

Physical contact is not normally part of coaching.

Where culturally appropriate and freely welcomed, brief contact such as a handshake may occur.

The coach will not initiate physical contact that could reasonably be interpreted as inappropriate, unwanted, sexual or exploitative.

Consent and respect for personal, cultural and physical boundaries are paramount.

Where there is uncertainty, the coach will err on the side of maintaining greater professional distance.

15. Coaching in Clients' Homes

Home visits may be appropriate where agreed in advance and where the environment is suitable for coaching.

When coaching within a client's home, the coach will:

- maintain professional behaviour;
- remain focused on the coaching purpose;
- respect the client's privacy and dignity;
- avoid entering unnecessary areas of the property;
- maintain appropriate physical and interpersonal boundaries;
- undertake dynamic risk assessment; and
- leave if personal safety becomes compromised.

Where safeguarding concerns arise, the Safeguarding Adults Policy will be followed.

Further arrangements for safe lone working are set out in the Lone Working Policy.

16. Transporting Clients

Transporting clients is not normally part of the coaching service.

Where exceptional circumstances arise, transporting a client will only be considered after careful consideration of:

- safeguarding;
- insurance;

- consent;
- road and personal safety;
- professional boundaries;
- necessity; and
- whether suitable alternatives are available.

Alternative transport arrangements should normally be encouraged.

The coach will not transport a client where doing so would create an unacceptable risk or inappropriate boundary.

17. Financial and Commercial Boundaries

Fees and payment arrangements will be agreed before coaching begins and managed transparently.

The coach will not:

- borrow money from clients;
- lend money to clients;
- enter personal financial arrangements with clients;
- enter business ventures with current clients;
- solicit investments or loans from clients;
- accept financial arrangements outside the agreed coaching terms; or
- use the coaching relationship to obtain inappropriate financial or commercial advantage.

Where a potential conflict arises between a coaching relationship and another commercial interest, it will be disclosed and managed appropriately.

The coach will not receive undisclosed financial benefit for referring a client to another service.

Where any referral arrangement involves a financial or other material interest, this will be made transparent and considered carefully for conflicts of interest.

18. Conflicts of Interest

The coach will remain alert to actual, potential and perceived conflicts of interest.

Conflicts may be:

- personal;
- financial;
- commercial;

- professional;
- organisational; or
- relational.

Where a conflict arises, the coach will:

1. identify the nature of the conflict;
2. consider its potential impact on the client;
3. disclose relevant information openly where appropriate;
4. seek supervision or professional advice where necessary;
5. consider whether the conflict can be managed effectively; and
6. withdraw from the coaching relationship where the conflict cannot be adequately managed.

The client's interests and the integrity of the coaching relationship will take priority over the coach's personal or commercial interests.

19. Confidentiality and Information Boundaries

Confidentiality is central to effective coaching.

The coach will respect client confidentiality and handle personal information in accordance with the Confidentiality & Privacy Policy and Data Protection Policy.

Information will only be shared without the client's consent where there is an appropriate lawful or safeguarding basis to do so, including circumstances where disclosure is required or permitted by law or necessary to protect someone from serious harm.

The coach will not use client information for personal, social or commercial advantage.

Supervision will be conducted in a manner that protects client confidentiality, with client information anonymised or minimised wherever reasonably possible.

20. Safeguarding and Emergency Boundaries

The coaching relationship does not create an obligation for the coach to provide emergency or crisis intervention.

Where safeguarding concerns arise, the coach will follow the Safeguarding Adults Policy.

Where there is an immediate and serious risk to life or safety, emergency action may be necessary, including contacting emergency services or another appropriate service.

In such circumstances, the usual boundaries of confidentiality may be overridden where legally or ethically justified.

The coach will explain relevant limitations of confidentiality to clients as part of establishing the coaching relationship.

21. Professional Competence and Referral

The coach will work within the limits of professional competence.

Where a client's needs fall outside the appropriate scope of coaching, the coach will not attempt to provide a service for which they are not appropriately qualified or competent.

Depending on circumstances, the coach may:

- discuss the limitations of coaching;
- recommend an appropriate professional or service;
- pause coaching;
- end coaching; or
- seek professional supervision or advice.

Referral is not a failure of coaching. It is an appropriate professional response when another form of support is better suited to the client's needs.

22. Supervision and Ethical Decision-Making

Professional supervision is an important safeguard for maintaining appropriate boundaries.

Supervision provides an opportunity to:

- reflect on practice;
- identify boundary concerns;
- explore ethical dilemmas;
- consider conflicts of interest;
- identify unconscious bias;
- consider the impact of personal reactions;
- support safe decision-making; and
- maintain professional development.

Where a significant boundary concern arises, the coach will normally discuss it in supervision while maintaining client confidentiality.

Where necessary, independent professional advice may also be sought.

23. Ending the Coaching Relationship

The coaching relationship may end:

- by mutual agreement;
- when coaching goals have been achieved;
- when coaching is no longer appropriate;
- when the client requests an end;
- where professional boundaries cannot be maintained;
- where a conflict of interest cannot be adequately managed;
- where safety becomes compromised; or
- where the coach determines that continuing would not be professionally appropriate.

Where possible, coaching will be ended respectfully and with appropriate notice.

Where appropriate, alternative sources of support or referral may be discussed.

Ending coaching does not remove ongoing responsibilities concerning confidentiality, professional conduct or appropriate management of information.

24. Concerns About Professional Boundaries

Clients who believe that professional boundaries have not been maintained are encouraged to raise their concerns.

Concerns will be addressed:

- respectfully;
- openly;
- fairly;
- promptly; and
- without retaliation or disadvantage for raising a genuine concern.

Information regarding the formal complaints process is contained within the Complaints Procedure.

25. Relationship with Other Policies

This policy should be read alongside:

- Coaching Agreement / Terms of Coaching;
- Safeguarding Adults Policy;
- Lone Working Policy;
- Confidentiality & Privacy Policy;

- Data Protection Policy;
- Complaints Procedure; and
- other relevant professional policies and procedures.

These documents should be interpreted consistently as part of Insight2Excellence's wider professional governance framework.

26. Professional and Legal Framework

This policy is informed by relevant professional and legal standards, including:

- Association for Coaching Global Code of Ethics;
- Universal Coaching Alliance Code of Professional Conduct and Ethics;
- relevant UK health and safety principles;
- Equality Act 2010 and associated guidance;
- UK data protection and confidentiality requirements;
- relevant consumer protection and service standards; and
- professional insurance and risk-management principles.

The policy will be interpreted alongside the law and the professional standards applicable to Insight2Excellence.

27. Review

This policy will be reviewed annually or sooner if:

- legislation changes;
- professional guidance changes;
- the nature of the coaching service changes;
- Insight2Excellence expands or appoints additional coaches;
- learning from practice identifies improvements;
- a significant boundary concern or complaint identifies a need for change; or
- new technologies or communication methods create additional boundary considerations.

Next scheduled review: September 2027.