

## **BUSINESS FOR HERBALISTS**

### **PROFESSIONALISM AND ETHICS IN CLINICAL PRACTICE**

#### **WORKSHOP OUTLINE**

##### **1) Introduction & Definition of a Herbal Medicine Clinician**

##### **2) Five Principles of Western Herbal Medicine**

1. Do No Harm
2. Holistic Perspective – Health Means Wholeness
3. The Healing Power of Nature
4. Treat the Cause, Not Just the Symptoms
5. Herbal Clinician as a Teacher

##### **3) A Wholistic viewpoint of an ethical, professional practice**

- Professional Responsibility and Accountability
- Legal Obligations and Responsibilities in Clinical Practice
- Client Practitioner Relationship
- Privacy and Confidentiality
- Relationships with Professional Colleagues
- Relationship with the Public
- Relationship with the Herbs, Conservation and the Earth

## Introduction & Definition of a Herbal Medicine Clinician

Having a herbal medicine clinical practice requires several components for success. A robust and detailed education and training followed by a supervised clinical practicum sets the herbal medicine practitioner up with a good foundation to draw upon. A practice of any kind is just that, a practice. Every moment spent in practice is building upon that foundation, step by step, creating more competency in an effort to be of service to your clients to find balance with their wellness.

The following outline has been created to assist those starting out with guidelines to follow as they begin to develop their practice. This format may also be useful to those who are already practicing who wish to implement more systems and structures to their practice.

To date, Herbal Medicine practice in Canada is not a regulated trade. It is within the prudence of the herbal medicine practitioner to seek peer review to determine and evaluate their readiness for practice. Several provincial associations offer peer review where education and training to date is reviewed and determined if it meets the criteria the association requires.

### Criteria of the Different Associations

**The CHAofBC (Canadian Herbalist's Association of British Columbia)** 2000 hours of varied Western Herbal Medicine Training that also includes human sciences with 500 hours of supervised clinical practice

**The OHA (Ontario Herbalists Association)** 1500 hours of varied herbal medicine training that also includes human sciences plus 350 hours of supervised clinical practice

**The AHA (Alberta Herbalists Association)** 1500 hours of varied herbal medicine that also includes human sciences plus 50 hours of supervised clinical hours and 100 hours of semi-supervised clinic.

### Herbal Medicine Clinician Defined

#### The CHAofBC defines a Registered Herbal Therapist as:

*Trained in the philosophies, principles and practice of Western Herbal Medicine and is able to assess the condition of a patient and to consequently recommend and dispense plant medicines in a safe and effective manner. She/he maintains practitioner-client relationships within an herbal practice and is registered as a Professional Member by an appropriate Herbal Medicine Association. An Herbal Therapist complies with the Code of Ethical Conduct of their Association.*

## **FIVE PRINCIPLES OF WESTERN HERBAL MEDICINE**

Having an ethical framework to lean into and draw upon in herbal medicine practice will bring a sense of security and responsibility to your day to day interactions with your clients.

Aligning with these principles will bring an ethical holistic quality to your practice.

Source: CHAofBC Standard of Practice for Herbal Therapists

### **1. Do No Harm**

An Herbal Therapist is accountable and takes responsibility for their actions. An Herbal Therapist practices within the Constitution, Code of Ethical Conduct and Scope of Practice, and always within personal competencies. An Herbal Therapist will perform a careful assessment and make appropriate recommendations, offering protocols that will be of benefit to the health and wellbeing of the client.

### **2. Holistic Perspective – Health Means Wholeness**

The word ‘heal’ comes from the Greek word ‘holos’ meaning to make whole. An Herbal Therapist considers the interconnectedness of the mind, emotions, social and environmental factors with the human body when determining the health status of the client.

### **3. The Healing Power of Nature**

The human organism possesses the inherent power to protect, regulate, adjust and heal itself. Although the Herbal Therapist may treat specific symptoms, the purpose of therapy is to encourage the body’s natural recuperative functions.

### **4. Treat the Cause, Not Just the Symptoms**

The fourth principle of Western Herbal Medicine is to not simply to treat the symptoms, but to address the underlying disturbances that interfere with homeostasis. The World Health Organization has defined health as: “The condition of perfect bodily, spiritual and social well-being, and not solely the absence of illness and injury.” In our holistic model, we recognize the disturbances which may be of physical functions and/or may have emotional, mental or spiritual components. An Herbal Therapist aims to establish the cause of disturbances, if possible, and then incorporates a program suitable for the individual.

### **5. Herbal Clinician as a Teacher**

An Herbal Therapist works in partnership with his/her client by fostering the concept of self-care, while offering support and herbal expertise. An Herbal Therapist educates clients on their therapeutic options allowing the client to make informed decisions. The Herbal Therapist is an information resource for the general public and other health care professionals.

## **A WHOLISTIC VIEWPOINT OF AN ETHICAL, PROFESSIONAL PRACTICE**

Developing a holistic viewpoint and framework for an ethical professional practice requires developing relationships. Everything from your direct relationship to your practice, to your relationships with your clients, other practitioners, your community and more.

### **Professional Responsibility, Accountability and your relationship to your Practice**

A Herbal Medicine Clinician/Practitioner has a professional responsibility to maintain and strives to be accountable to these responsibilities. This will build the health and quality of your practice. This section provides guidance on how to create a relationship with your practice.

#### **Consider:**

***At all times be capable of delivering the services you are providing.***

- Nurtures/promotes your own physical, mental and emotional well-being.
- Provides services with competence and clear mind
- Stay current with governmental policies
- Participate in continuing education/professional development
- Establish health care environments that are conducive to safe and competent practice
- Presents qualifications accurately, honestly and clearly
- Recognizes the boundaries of competence.
- Function within legal parameters
- Keep clear and organized client notes
- Communicate efficiently with clients, corresponding in a timely manner
- Keep fees publicly displayed and communicate fee structure to clients prior to appointments
- Develop an invoicing system and be consistent with exchange of money

### **Legal Obligations and Responsibilities in Clinical Practice**

There are certain legal requirements to maintaining a clinical practice, moreover there are several ethical responsibilities to consider as well.

#### **Consider:**

- Provide a consent form to the client for signing at the initial clinical consultation describing the responsibilities and limitations of the practitioner which shall be kept in the client's file.
- For clients under the age of 16 or someone otherwise unable to sign for themselves, the consent form will be signed by a parent, or legal guardian
- Essential to hold all personal information gathered during consultations in strict confidence unless legally required to do otherwise or directed by the client in writing.
- Keep all client files in a secure, locked area. Keep all files for a minimum of 7 years.
- Records shall be disposed of in a permanent manner (shredding, burning).
- It is highly recommended to carry appropriate levels of professional indemnity insurance.
- During situations such as COVID-19 it is recommended to have an additional form and/or waiver and/or release of liability outlining requirements of the client as well as your responsibilities to the situation.

## **Client Practitioner Relationship**

Just as the clinician is developing a relationship with their practice they must develop a relationship with their clients that embodies respect and trust with healthy boundaries and expectations. The clearer the clinician is regarding these concepts, the more successful the relationship will be at providing support for wellness and health.

### **Consider:**

- The herbal medicine practitioner shall not discriminate against any client on the basis of their religious, spiritual, political and social views; and will give the best care possible regardless of race, colour, creed, gender, sexual orientation, disability, age, economic or social status
- The practitioner has the right to refuse to accept an individual as a client for personal or professional reasons or limitations referring them to a suitable practitioner when appropriate.
- Ensure the client relationship remains therapeutic and professional, when questionable, practitioner shall discontinue therapy and refer to another competent practitioner.
- Ask the clients' permission/consent before engaging in any form of practice that requires physical contact.
- Assumes the role of educator and promotes self–responsibility of the client in their health care via:
  - Engaging the client as an active participant in decisions regarding their protocol.
  - Informs clients of expected effects, potential risks and limitations of remedies.
  - Ensures clients have accurate information, to the best of his/her knowledge.
  - Explains information about the therapy in terms clients can understand.

## **Privacy and Confidentiality**

In a herbal medicine practice it is essential to uphold the client's right to privacy.

### **Consider:**

- Hold all information gathered during a consultation in strictest confidence.
- It is the responsibility of the herbal clinician to notify the appropriate authority (e.g. in cases such as abuse, intended harm, suicide) as allowed or required by law.
- With consulting virtually, choose a platform that allows for high level of confidentiality. If recording the consult ensure this file is held in confidence off of the platform.
- Be discreet when encountering client in public situations. Avoid 'shop talk' outside of the safe space of clinic.

### **Relationships with Professional Colleagues**

Maintaining a community of health professionals to access and refer out to when necessary or gain support with is important. Often herbal medicine practitioners work within a solo practice. Have peers within your community is a vital resource.

#### **Consider:**

- Herbal Medicine Clinician refers out to competent practitioners if client's needs exceeds their limits.
- Collaborates with other health care providers for client care with the client's consent.
- Does not solicit clients from another herbalist
- Encouraged to exchange ideas and information with other herbalists for the purpose of enhancing understanding and knowledge within the field of herbalism.
- Treats colleagues and other professionals with respect
- Refrains from criticizing another professional's qualifications, knowledge, competency, procedures, judgement etc.
- In the case of a gross misconduct, discretely takes the matter up with the professional organization the practitioner is associated with

### **Relationship with the Public**

Being an ally and a public voice for herbal medicine practice helps develop your herbal medicine practice. Positively representing herbal medicine in the public helps gain awareness of this trade with healthy perspective.

#### **Consider:**

- Contribute to the advancement and awareness of herbal medicine
- Strive to promote your services in a manner which will positively affect the reputation of herbal medicine.
- Accurately represent your qualifications and the scope of herbal medicine practice
- Avoid supporting the cure-all remedy and represent the holistic scope of herbal medicine practice
- Support the work of the various provincial associations as well as the work of the Canadian Council of Herbal Associations.

### **Relationship with the Herbs, Conservation and the Earth**

Ultimately, the relationship that is built between the practitioner of herbal medicine and the earth will deeply instill longevity and health in a mutually beneficial way.

#### **Consider**

- Honour the Earth and educate others regarding the importance of its preservation and renewal
- Choose herbal remedies and other therapies that best address and supports clients specific needs and/or health issues.

- Strive to be informed about the herbal medicines used, seeking out sustainably grown and harvested and ethical methods of collection
- Choose manufactures and suppliers with ethical business practices
- Consider the issue and implication of animal research by supporting non animal research and products not tested on animals
- Exchange ideas and information with other herbalists for the purpose of enhancing understanding and knowledge of the field of herbal medicine
- Pass on knowledge, experiences and ethical principles and practices to the future generation of herbalists

## RESOURCES AND WEBSITES

- <https://herbalccha.org> Canadian Council of Herbal Associations
- <https://www.albertaherbalists.com> Alberta Herbalists Association
- <http://www.chaofbc.ca> Canadian Herbalist Association of British Columbia
- <https://ontarioherbalists.ca> Ontario Herbalists Association
- <http://herbalns.org> Herbal Association of Nova Scotia
- <https://www.americanherbalistsguild.com> America Herbalist Guild
- <https://www.naimh.com> North American Institute of Medical Herbalism