HOUSING SPECIALIST

Professional Ethics & Boundaries Checklist

Professional Download #26

Purpose
This toolkit helps Housing Specialists apply professional ethics in daily work. It covers confidentiality, informed consent, conflicts of interest, gifts and incentives, fair housing, accurate documentation, appropriate referrals, and responsible use of AI — with realistic dilemmas and a structured decision-making framework.

What's Inside (6 Pages)

1. Professional Ethics Baseline — identify strengths and training needs.
2. Ethics & Conduct Checklist — confidentiality, conflicts of interest, fair housing and professional responsibilities.
3. Informed Consent & Responsible AI — safeguards for sharing information and using digital tools.
4. Ethical Decision-Making Worksheet — a seven-step framework with a realistic scenario.
5. Boundaries & Escalation Exercises — practise responding to gifts, sensitive information requests and unverified approvals.
6. 30-Day Ethics Improvement Plan — establish learning goals and supervisory review.

Important Professional Reminder
Ethical practice protects clients, colleagues, and the integrity of housing services. When in doubt, pause, consult your supervisor or ethics lead, and document your reasoning. This toolkit supports professional judgment — it does not replace organizational policy or legal advice.

Housing Specialist: _____ **Date:** _____

Supervisor / Reviewer: _____ **Review Date:** _____

1. Professional Ethics Baseline

Rate your current confidence (1 = Need significant support, 5 = Strong and consistent)

Confidentiality & privacy ..... ■ 1 ■ 2 ■ 3 ■ 4 ■ 5
Informed consent practices ..... ■ 1 ■ 2 ■ 3 ■ 4 ■ 5
Recognizing conflicts of interest ..... ■ 1 ■ 2 ■ 3 ■ 4 ■ 5
Fair housing awareness ..... ■ 1 ■ 2 ■ 3 ■ 4 ■ 5
Accurate & objective documentation ..... ■ 1 ■ 2 ■ 3 ■ 4 ■ 5
Appropriate professional boundaries ..... ■ 1 ■ 2 ■ 3 ■ 4 ■ 5
Responsible use of AI / digital tools ..... ■ 1 ■ 2 ■ 3 ■ 4 ■ 5

Areas I most want to strengthen:

_____

_____

2. Ethics & Conduct Checklist

Confidentiality & Privacy

■ I only access client information needed for my assigned work
■ I do not discuss client details in public or non-private spaces
■ I store and transmit client information according to agency policy

Conflicts of Interest & Gifts

■ I disclose any personal, financial, or relational conflicts that could affect my work
■ I do not accept gifts, favors, or incentives that could influence professional judgment
■ I know the process for reporting a potential conflict of interest

Fair Housing & Non-Discrimination

■ I provide services without discrimination based on protected characteristics
■ I am alert to steering, differential treatment, or biased language in housing processes

Documentation & Referrals

■ My case notes are factual, objective, and free of unsupported opinions
■ I make referrals based on client need and eligibility, not personal preference or convenience

3. Informed Consent & Responsible AI

Informed Consent Checklist (before sharing client information)

- ■ Client understands what information will be shared and with whom
- ■ Client understands the purpose of the sharing
- ■ Client understands any limits to confidentiality (e.g., safety, legal requirements)
- ■ Consent is documented (verbal with note, or written) according to agency policy
- ■ Only the minimum necessary information is shared

Responsible Use of AI & Digital Tools

- ■ I do not enter identifiable client information into public or unapproved AI tools
- ■ I treat AI-generated content as a draft that requires my professional review and judgment
- ■ I verify accuracy of any AI-assisted summaries, letters, or recommendations before use
- ■ I follow my agency's policy on approved tools and data handling
- ■ I can explain to a supervisor how I used (or did not use) AI in a given piece of work

Notes / Questions for Supervision on Consent or AI Use:

_____

_____

_____

4. Ethical Decision-Making Worksheet (Seven Steps)

Scenario: A landlord offers you a small “thank-you” gift card after you successfully placed a client. Separately, a colleague asks you to “just approve” a housing application quickly because the client is a family friend, even though two required documents are still missing.

Step 1 – What is the ethical issue or dilemma?

_____

Step 2 – Who is affected (client, colleagues, agency, public trust)?

_____

Step 3 – What professional values and policies apply?

_____

Step 4 – What are the possible courses of action?

Option A: _____
Option B: _____
Option C: _____

Step 5 – What are the likely consequences of each option?

_____
_____

Step 6 – Which option best aligns with ethics, policy, and client interest? Why?

_____
_____

Step 7 – What will I do, and do I need to consult a supervisor?

_____

5. Boundaries & Escalation Exercises

Exercise A – Gift / Incentive

A grateful client offers you a personal gift. Write a brief, respectful response that maintains the boundary:

_____

_____

Exercise B – Request for Sensitive Information

Someone outside the authorized care team asks for detailed client information “just to help.” How do you respond while protecting confidentiality?

_____

_____

Exercise C – Pressure to Bend Process

You are asked to mark a requirement as complete when it is not. What do you say, and what is your next step?

_____

_____

When to Escalate Immediately

- Suspected fraud or intentional misrepresentation
- Request that would violate fair housing or anti-discrimination rules
- Pressure to ignore safety, legal, or policy requirements
- Conflict of interest you cannot manage alone
- Any situation where client safety or rights may be at risk

6. 30-Day Ethics Improvement Plan

My top 2 ethics / boundaries learning goals for the next 30 days:

Goal 1: _____

Goal 2: _____

Specific actions I will take:

- ■ Review agency ethics / confidentiality policy
- ■ Discuss one real or practice dilemma in supervision
- ■ Complete additional training module (if available)
- ■ Practice boundary language in at least two real interactions
- ■ Other: _____

How I will know I am improving:

_____

_____

Scheduled supervisory check-in date: _____

Supervisor Comments / Support Offered

_____

_____

_____

Housing Specialist Signature	Date	Supervisor Signature
_____	_____	_____

Keep this completed checklist in your professional development file. Revisit it during supervision and annual review. Update your goals as your role and responsibilities evolve.