

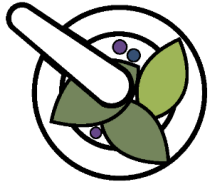
# BRITISH COLUMBIA HERBALISTS ASSOCIATION

## Standards of Practice for Herbal Therapists

Based on documents compiled by the Canadian Council of Herbalist Associations

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## INTRODUCTION

The purpose of this document is to safeguard good standards of professional integrity among Herbal Therapists in British Columbia who wish to be affiliated with the British Columbia Herbalists Association. It serves to link the principles of traditional herbal medicine with contemporary standards of professional conduct.

## DEFINITION

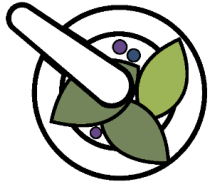
A Registered Herbal Therapist is trained in the philosophies, principles and practice of Western Herbal Medicine and is able to assess the condition of a patient and to consequently recommend and dispense plant medicines in a safe and effective manner. She/he maintains practitioner-client relationships 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.

### EXPANDED DEFINITION:

A Registered Herbal Therapist is an individual trained in the practice of herbal medicine who:

- Is trained in the therapeutic use of crude botanical medicines; and
- Primarily uses traditional preparations\* of crude botanical material; and
- Is qualified\*\* and competent to take this responsibility and be held accountable for his/her recommendations.

\*Traditional preparations include, but are not limited to tinctures, teas, capsules, infusions, decoctions, syrups, plasters, poultices, oils, liniments, ointments, fomentations, salves, etc.



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\*\*Appropriate qualification is obtained through such methods as classroom training, self-study, and mentorship. In accepting the role of professional herbalist, she/he must be knowledgeable and show continuing competence in:

- The ability to conduct a comprehensive health assessment; and
- Understanding of the individual, their family and community; and
- The ability to promote healthy choices for diet and lifestyle; and
- Assessing health issues; and
- Managing health issues planning and implementation of herbal care, referrals, etc.; and
- Managing a practice; and
- Understanding of herb-drug interactions and contraindications.

## FIVE PRINCIPLES OF WESTERN HERBAL MEDICINE

It is essential that all activities of an Herbal Therapist be performed with a reasonable effort to align with the Five Principles of Western Herbal Medicine

### 1. *Primum non nocere* - Do Not Harm

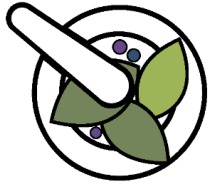
An Herbal Therapist is accountable and takes responsibility for their actions. An Herbal Therapist practices within the Constitution, Code of Ethical Conduct and Scope of Practice, and always within personal competencies. An Herbal Therapist will perform a careful assessment and make appropriate recommendations,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

### 2. Holistic Perspectives- 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. *Vis medicatrix naturae* - 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.



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## 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 Therapist 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.

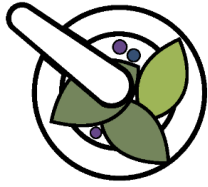
## CODE OF ETHICAL CONDUCT

The Code of Ethics covering an herbal practitioner is the underlying value that influences and directs the behaviour and conduct of herbal practitioners. The Code of Ethics governing herbal practitioners involves such principles as, honour, integrity, conscientiousness, caring, fairness, dignity, responsibility, accountability, confidentiality, respect, honesty, impeccability and excellence.

All herbalists must uphold these values in their relationships with their clients. The client-herbalist relationship presupposes a certain measure of trust on the part of the client. Upholding codes of ethical conduct will assist to build and maintain client trust and confidence.

Code highlights the responsibilities and obligations of Herbal Therapists in client-practitioner relationships.

All members have a responsibility to follow our Code of Ethical Conduct.

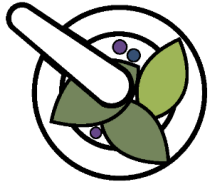


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## 1. Professional Responsibility and Accountability

An Herbal Therapist:

- Is capable of delivering services, assuming primary responsibility for maintaining competence to engage in the practice of herbal medicine.
- Possesses a primary interest in the care for the health and well-being of the client.
- Nurtures/promotes her/his own physical, mental and emotional well-being.
- Provides services with competence and clear mind (for example, and not limited to, being impaired by the use of substances such as alcohol or drugs, legal or otherwise).
- Self-assesses, from time to time, against this Code of Ethical Conduct and maintains BCHA competency requirements.
- Stays current with governmental policies.
- Participates in continuing education/professional development.
- Establishes health care environments that are conducive to safe and competent practice.
- Presents qualifications accurately, honestly and clearly when requested.
- Works to correct any misrepresentations.
- Recognizes the boundaries of their competence.
- Functions within legal parameters.
- Behaves with courtesy and respect in their association with clients.
- Will act in the best interest of the client.
- Expresses a philosophy that is congruent with the Canadian Charter of Rights and Freedoms.
- Provides care within the Scope of Practice.
- Assumes the role of educator.
- Promotes self-responsibility of the client in their health care.
- Takes reasonable personal actions in the interest of public safety.
- In cases where a client chooses to ignore the recommendations of the professional herbalist or another health care provider, and that decision poses a serious health risk to the client, it is recommended that the professional herbalist make a written notation.
- Does not promote any 'cure-all' therapy.
- Encourages harmonious relationships with other health care professionals.
- Supports the endeavors of the BCHA and other parties involved in advancing the future of the profession of herbal medicine.
- Shall not knowingly assist in suicide and abortion.
- It is highly recommended that professional herbalists carry appropriate levels of professional indemnity insurance.

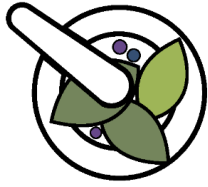


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## 2. Client Practitioner Relationship

### An Herbal Therapist:

- Will conduct their consultations with care and mindfulness of the clients' health needs.
- Must behave with courtesy, respect, dignity, discretion, tact and empathy in their association with clients.
- 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.
- Has the right to refuse to accept an individual as a client for personal or professional reasons or limitations, and does his/her best to refer them, when appropriate.
- Will recognize that their clients have individual needs and will respect the client's right to make informed choices regarding their own health care.
- Will acknowledge limits of their individual scope of practice and refer when appropriate.
- Will hold all personal information gathered during consultations in strict confidence unless legally required to do otherwise or directed by the client in writing.
- Will respect the dignity and worth of all people by treating all people as unique individuals.
- Will behave in a non-discriminatory manner in line with the Charter of Rights and Freedoms.
- Encourages client involvement in health planning and promotes self responsibility.
- Is sensitive to the individual needs and privacy.
- Is respectful of the client's values, dignity and choices.
- Will advise client of conflict of opinion or values.
- Engages the client as an active participant in decisions.
- Informs clients of expected effects, potential risks and limitations of remedies.
- Ensures clients have accurate information, to the best of his/her knowledge.
- To the best of her/his ability, explains information about the therapy in terms clients can understand.
- Provides clients with informed consent forms (release forms).
- Provides options in therapies where possible to serve the client's needs and financial situation.
- Encourages clients to make informed choices, even when it (therapy service etc.) may be obtained elsewhere.
- Honors the client's decision to accept or reject any therapy.
- Shall involve accepted legal practice by involving a legal guardian or parent for minors.



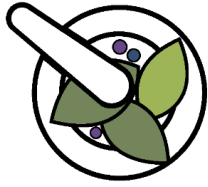
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- Obtains permission to consult through a power of attorney (substitute decision maker) in the case of diminished capacity of the client. Involve clients with diminished competence in decision making as much as they are capable.
- Will ask the clients' permission before engaging in any form of practice that requires physical contact.
- Will refrain from unscrupulous and/or exploitative behaviour towards clients.
- Where it appears that a client is making sexual advances, it is the duty of the professional herbalist not to encourage the client and to clarify the relationship.
- Ensures that the client- Herbal Therapist relationship remains therapeutic and professional, when questionable, practitioner shall discontinue therapy and refer to another competent practitioner.
- Uses professional judgment to avoid compromising/inappropriate relationships with clients.
- It is recommended that professional herbalists provide a waiver 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 waiver will be signed by a parent, or legal guardian.
- If a legal guardian is not present, professional herbalists shall obtain written consent prior to the initial consultation with a client under the legal age (16-year-old for BC).
- Professional herbalists shall agree upon the fee schedule prior to the start of the services.
- Upon request, professional herbalists shall provide full disclosure of their credentials.
- May make available, upon request the Code of Ethics, Code of Practice and certificates of professional membership of their perspective membership.

### 3. Privacy and Confidentiality

#### An Herbal Therapist:

- Upholds the client's right to privacy.
- Protects confidentiality.
- Case files shall be kept in a secure location.
- Files must be retained for at least seven years following the last visit.
- Records shall be disposed of in a permanent manner (shredding, burning).
- Will hold all information gathered during a consultation in strictest confidence.
- Understands the limitations of this confidence with regards to legal responsibility to report any clear and present danger to others or the individual to the RCMP or other authorities.



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- Makes all reasonable efforts to inform clients if records of a confidential nature are summoned for legal or ethics investigations.
- Makes necessary reports to RCMP or other authorities when required by law.
- If a client is suspected of having a condition that poses a public health risk, the professional herbalist will recommend the client consult with the appropriate public health authorities.
- It is the duty of the professional herbalist to notify the appropriate authority (e.g., in cases such as abuse, intended harm, suicide) as allowed or required by law.

## 4. Other Professionals

An Herbal Therapist:

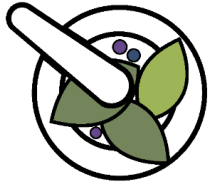
- Refers out to competent practitioners if client's needs exceed the practitioner's limits.
- Collaborates with other health care providers for client care with the client's consent.
- With the permission of their client, shall cooperate with other health care professionals for the benefit and well-being of their client.
- Shall not solicit clients from another herbalist.
- Are 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 and in no way engages in criticizing directly or indirectly another professional's qualifications, knowledge, competency, procedures, judgement etc. unless it comes to his/her attention a gross breach of professional conduct and competency, on the part of the other professional.
- In such a case, s/he discretely takes the matter up with the professional organization's complaints channels available to him/her.

## 5. Our Relationship with The Public

An Herbal Therapist:

- Is encouraged to contribute to the advancement and awareness of herbal medicine.
- Strives to promote their services in a manner which will positively affect the reputation of herbal medicine.
- Shall accurately represent their qualifications.





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## 6. Herbs, Conservation & Earth

An Herbal Therapist:

- Shall honour the Earth and educates others regarding the importance of its preservation and renewal.
- Chooses herbal remedies and other therapies that she/he feels best address and supports clients needs and/or health issues.
- Whenever possible, professional herbalists shall strive to be informed that herbal medicines used are grown and harvested using sustainable and ethical methods.
- Chooses manufactures and suppliers with ethical business practices to the best of his/her knowledge.
- Whenever possible, professional herbalists should seriously consider the issue and implication of animal research and encourage our members to seek non animal research and products not tested on animals.
- Exchanges ideas and information with other herbalists for the purpose of enhancing understanding and knowledge of the field of herbal medicine.
- Passes on knowledge, experiences and ethical principles and practices to the future generation of herbalists.

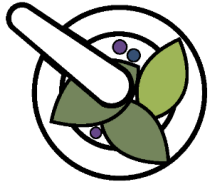
## SCOPE OF PRACTICE

### 1. Introduction to The Scope of Practice

The practice of herbal medicine is the promotion, maintenance, and restoration of an individual's health primarily through the internal and external use of herbal medicines (derived from plants, fungi and algae, or parts thereof), which may or may not include other natural health products.

Herbal medicines may be harvested, prepared and/or compounded by the herbalist.

Therapeutic requirements for each client are assessed in a manner consistent with the tradition and training of the individual herbalist. Methods of assessment may include but are not limited to case history, physical / visual examinations, and the review of diagnostic test results.



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Relevant issues including nutrition, lifestyle, environment, and stress management may be addressed throughout the consultation process. These are the CCHA Canada-wide scope of practice; the BCHA interprets to mean:

## 2. Philosophy of Practice

Excerpted from the CCHA:

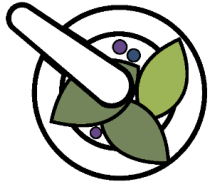
A professional herbalist works in partnership with his/her client by fostering the concept of self-care, while offering support and herbal expertise. A professional herbalist considers the interconnectedness of the mind, emotions, social and environmental factors with the human body when determining the health status of the client. The optimal state is one of balance of all processes underlying a body system or function. The philosophical approach of a professional herbalist is to seek to prevent and treat underlying causes of disease from a holistic perspective, acknowledging and embracing centuries of empirical knowledge and traditional principles of the usage of plant medicine, whilst continuing to evaluate both herbs and human disease in a modern scientific context.

## 3. Preamble

The Scope of Practice defines the role of an Herbal Therapist, the competencies, expectations and responsibilities of a client-herbalist relationship. The purpose of having standards is to direct the performance of the Herbal Therapist as they apply their specialized knowledge and skills. This may take place in a variety of clinical type settings, educational venues and in research opportunities. The Herbal Therapist is limited in practice by provincial and federal reserved acts. The Herbal Therapist must adhere to laws that protect minors, the mentally incompetent and at-risk clients.

## 4. Clinical Inquiry/Consultation

An Herbal Therapist works in a private practice, full or part time. The initial client visit involves a detailed intake of client information regarding the primary health concern. A detailed history may or may not be warranted depending on the nature of the health concern, location and circumstance. Careful assessment provides a foundation for choosing treatment protocols.



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The case history may include:

- Personal information i.e., age, gender and contact info
- Major presenting health issue(s) with history/development of health issue(s)
- Medications, supplements or other remedies being used.

And any additional data that applies to the assessment evaluations for their tradition, such as:

- Diet
- Lifestyle and habits
- Spirituality

Follow up consultations are scheduled to monitor progress, to make adjustments, to offer motivation, to ensure that the healing program, and herbal remedies are being used properly. The Herbal Therapist takes responsibility for arranging and conducting the follow up consultation(s). This may be done in person or by telephone. The Herbal Therapist inquires of the client about any adverse events, or any changes made to their herbal or drug dosing. A detailed record is kept on file for future reference. All

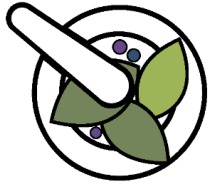
information obtained is kept confidential unless some other arrangement has been agreed upon in writing.

## 5. Clinical Assessments

Observation of the client begins from the first contact. During the oral interview the Herbal Therapist notes any relevant observations, such as, the manner in which the client presents, state of awareness, posture, skin color and any other indicators of the client's general state of health.

An Herbal Therapist's ultimate goal and commitment is to lead their clients to health. To accomplish this goal, they utilize different means of assessing the client's condition depending on their level of training, experience, sensitivity and intuition. Even though today's Herbal Therapists are trained in western types of clinical assessment procedures, they are also aware of and are trained in exploring the energetic underpinnings motivating symptoms.

Therefore, depending on each case, they may use their professional judgment to the best of their ability to use either one or the other or drawing upon a combination of both such assessments in the best interest of their client.



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Only legally allowed services and examinations may be performed. The client will be asked for permission before touching.

## 6. Personalized Care Plan

The subjective data supplied by the client is combined with the objective data collected by the Herbal Therapist and is evaluated in order to develop a therapy plan. Herbal Therapists utilize various means to empower an individual to achieve the highest level of health possible. She/he chooses herbal remedies and other treatments that best address the underlying cause of illness/imbalance, and/or client's needs.

### a. Herbal Remedies

Herbal medicines are derived from parts of plants, fungi and algae that elicit a pharmacological, nutritive and energetic effect. Once dispensed the herbal medicines are self-administered by the client.

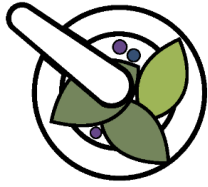
#### i. Materia Medica

All Herbal Therapists are entrusted with the use of herbal medicines used within their paradigm along with the pursuit of standards of evaluation of those herbs newly introduced to their tradition. A Herbal Therapist can justify their decisions with references to knowledge and theory specific to their tradition of practice.

#### ii. Herbal Preparations

Herbal medicines may be taken in various forms, according to their own traditions. Examples of preparations for internal use include, but are not limited to:

- Water extractions including infusions and decoctions.
- Solvent extractions including tinctures, fluid extracts, glycerites and acetics.
- Hydrosols and other aromatic waters
- Syrups
- Essential oils
- Resins



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- Powders
- Lozenges
- Tablets
- Capsules
- Standardized extracts
- Flower essences

Examples of preparations for external use include, but not limited to:

- Powders
- Fomentations/compresses
- Poultices
- Plasters
- Creams
- Infused oils
- Ointments/salves
- Liniments
- Essential oils
- Smudging
- Baths, soaks

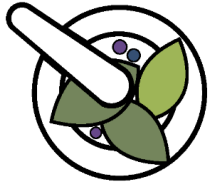
### iii. Compounding and Formulation of Herbal Remedies

A Herbal Therapist may recommend a combination of herbs, or single herbs to address a client's health needs. A formulation allows for a broad therapeutic outcome, addressing several overlapping needs in a single formula. The herbs are carefully blended to create a synergistic effect, the whole being greater than the sum of its parts. An individualized herbal remedy is compounded for each client based on the clinical relationship between the practitioner and that client. A Herbal Therapist may also prepare in advance, batches of herbal formulas for use in the context of his/her relationship with clients.

### iv. Dispensing of Herbal Remedies

A Herbal Therapist may have her/his own dispensary from which to formulate herbal remedies. The dispensary premises are kept clean and orderly. Herbal medicines shall be prepared in accordance with high standards of hygiene. A Herbal Therapist may dispense remedies formulated by another practitioner for use by her/his clients.

Each remedy will be labeled with instructions for use, and will include the following:



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- The name of the client
- The date
- The dosage
- How and when to take it
- The Practitioner contact information
- And may include the list of ingredients and keep out of reach of children.

## v. Processing of Raw Plant Materials

The professional herbalist is trained in the making of herbal medicine by transforming raw plant, fungi and algae materials into herbal preparations.

### b. Nutritional Modification

Recognizing that plant medicine starts with foods, the professional herbalist may make recommendations of which foods to decrease, increase, include or eliminate from the client's diet. Vitamins, minerals and other nutritional supplements may also be recommended.

### c. Lifestyle Modification

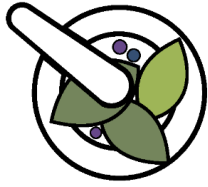
During a consultation the Herbal Therapist focuses on the wellness of the whole person and attention may be given to such lifestyle choices as exercise, personal habits, hygiene, environmental factors, alcohol, tobacco and drug use, and stress management.

### d. Education

The Herbal Therapist may recommend reading materials and other forms of self-study for the personal growth and wellness of the client. One of the goals of the Herbal Therapist is to teach the client how to best manage all aspects of their health so as to overcome and prevent illness.

## 7. Referrals

The Herbal Therapist may make referrals to other health care practitioners with different expertise when it is in the best interest of the client to further their health and wellbeing. An Herbal Therapist acts



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with full awareness of his/her abilities and limitations and knows when to refer a client onward for further treatment.

## 8. Currently, Not Within Our Scope of Practice

Internal examinations

- Specimen collection from bodily secretions
- Blood extractions
- Injections
- Surgery
- Medical diagnosis

## 9. Special Considerations

Pregnancy and lactation: having the training and knowledge, an Herbal Therapist chooses herbal remedies and other treatments to best support the health and well-being of pregnant women and nursing mothers. An Herbal Therapist shall recommend a client consults with her prescribing physician or a pharmacist when the client is choosing to reduce or discontinue prescribed drug regimes.