



IDTA Newsletter

Volume 17 Issue 3

September 2022

Welcome to the second issue for this year!

As in our previous issues in March and June, we express our regret about the current circumstances within Ukraine, Russia and the surrounding countries. We emphasise our commitment to our TA colleagues, wherever they are.

We continue to celebrate the progress of WOTAA – the World Online TA Association - because IDTA was one of the first supporters of this initiative to bring us all together worldwide. We are delighted that there are now already members in 27 countries. If you are not already a member, why not go to <https://wotaa.org> - free or a small donation, or already donated if you are a member of IDTA.



And keep reading - This time we have another great article by Eithna Coen, this time about how she analysed the situation when setting up a coaching service within an organisation. As before, Eithna did this is part of her submission towards her certification by the International Centre for TA Qualifications (www.ictaq.org) as TA Master Practitioner, an MSc, and potentially also CTA.

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IDTA Council News

IDTA Annual General Meeting

We held the AGM online on Saturday 23 July and the following were re-elected:

Julie Hay as Chairperson; Mary Tobin as Treasurer; Lynda Tongue as Chair TSC; and Eithna Coen and Traian Bossenmayer as Council Members. All except Julie were voted in on the basis that there was approval during the AGM from the Rule that says Council members can only serve for 4 years in any 6 years.

IDTA Council

We welcome more Council members. Why not volunteer – you can just be added to Council until the next AGM in summer 2023. All meetings are online – the next is planned for 17 October GMT 1500-1700. Just email admin@instdta.org to be invited – or have a no-obligation chat with Julie by booking at <https://juliehay.youcanbook.me>

We will be discussing, among other things, whether we should change the IDTA Constitution so that it does not say that we function only in the UK. IDTA is currently registered as a UK Charity as well as a UK Ltd Company so any change will be time consuming; it would be easier if we became a Community Interest Company but any such change might be used by EATA to end our affiliation.

WOTAA

Don't forget that IDTA was a founder member of the World Online TA Association - <https://wotaa.org>. Our intention as founder members was to provide a worldwide online hub so that members can find and contact each other, as well as all being able to see what online activities are available within the worldwide TA community. If you have not already joined, please go ahead and do so – IDTA already donated on your behalf.

There are now members in 27 countries –

Argentina, Australia, Belgium, Bosnia & Herzegovina, Brazil, China, Colombia, Germany, India, Iran, Ireland, Italy, Japan, Malta, Netherlands, Peru, Poland, Romania, Russia, Serbia & Montenegro, Slovakia, Sweden, Switzerland, Turkey, the United Arab Emirates, the UK and the USA. And with the corresponding range of different languages.

ITAA

IDTA Council have continued to support Julie Hay through a process that began in February when ITAA President contacted Julie to arrange a meeting that happened on 11 March. During that meeting ITAA President talked about ethical violations by Julie and IDTA.

IDTA Council is relieved that this process no appears to have been abandoned. After some more email exchanges, ITAA President finally wrote on 16 June 2022 that:

“ We offered an opportunity to come together to collaborate and find a mutually agreed statement.

We will not continue to communicate with these emails, in this long drawn out defence-attack manner.

If you choose to meet we're open, if you don't we consider the matter closed.

If you choose to go on social media that is entirely your call. We do not support this.

Signing off,

Chitra Ravi

ITAA President

On behalf of the ITAA BOT”

Julie was able to respond then with “Thank you for confirming the matter is closed. I am relieved to know, after 3 months of considerable stress to me, that you will not be carrying out your threat to me during the meeting on 11 March of raising of an ethics charge against me.”

ITAA President's email followed access by the BOT to the recording of the March meeting and an email that Julie had sent to BOT. The content of this is included at the end of this Newsletter if you wish to read it.

Professional Intervention

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Editor's Note: *this is an extract from a submission by Eithna towards her certification by the International Centre for TA Qualifications (www.ictaq.org) as TA Master Practitioner, an MSc, and potentially also CTA. The assessors thought her material so good that it should be published. We have amended this extract to disguise the identity of the client, although they gave their permission for ICTAQ assessors to know it.*

Mentions of (evidence) refer to items submitted with the portfolio for assessment.

Introduction and contact with sponsor

In this portfolio submission, Professional Intervention, using Transactional Analysis (TA) theory, concepts and application, the intervention I use to demonstrate my TA learning and development, during this module is the multiparty contracting I undertook to provide a one day workshop on TA, focusing on Developmental Transactional Analysis and some of its concepts, for trainers and Internal coaches working in an organisation, whose primary responsibility is for improving wellbeing and outcomes for children.

Contracting, as a major concept of Classical TA School, crosses all TA models, interlinks with all TA concepts, tools and techniques and is used in all schools of TA. Almost all authors in TA refer to contracting and its importance. Its significance can be seen, in that almost two thirds of our ethical codes refers in some way to contracting (ITAA 2014, EATA 2011, IDTA 2005). How we practice both ethically and professionally is taken into account in our contracting process. The contracts we agree influences and impacts the outcome of what we work on and how we work and the effectiveness of the work we do with our clients in either one-to-one, teams and/or groups or in organisation. There are different kinds of contracts a practitioner can work with, however they tend to operate from the same general principles. Berne first

introduced therapeutic contracts into his writing in 1966 (Hay 2017).

I was contacted by a manager within an organisation, which had in the past been part of my own organisation, and where my own organisation still had a responsibility for providing training. She was requesting a 1 day TA based training programme, that would equip trainers and coaches, including herself and some others who also has managerial roles, so that they could run, for the 4000 or so employees, a 3 day coaching skills programme, initially for managers and a 6 day leadership programme with the intention of adding to these programmes some TA concepts. The intended participants of the programme I would run, had learned some TA previously, although it seemed that there was an impression that TA consisted only of ego states.

In talking to the sponsor and checking the organisation website, journal articles and recent press releases (evidence 1), I learned that the organisation had divided from my own organisation, and now had a new CEO who was establishing a new leadership structure, which was leading to much change. I therefore analysed the organisation in terms of Berne's (1963) diagrams and came to the conclusion that it was a complicated structure. I used the organisational cone (Hay 2016) to consider the boundaries and divisions. It seemed to me that the agreement for my own organisation to provide the training might mean that I would be regarded by the participants as within the boundaries of their own organisation, with an equivalent impact on their group imagoes (Berne 1961). Also it seemed to me, demonstrated by the CEO being recruited externally and my invitation to provide this workshop (evidence 2) that the external boundaries are open. I conclude that the culture sought by the leadership team make it appropriate for the coaches and trainers to operate on the principles of TA (Berne 1961). TA tools and techniques can support trainers, coaches, clients and programme participants to develop and manage the change they want giving more options for analysing, assessing

and managing themselves, those they work with and the organisation's dynamics and boundaries. I therefore entered into a professional relationship with the sponsor on behalf of the leadership of the organisation to have this contract.

Contract with sponsor and development of overall contract

I realised from the outset that I would have to pay particular attention to the managers attending with their staff and build it into the contracting and whole workshop, knowing that this could create problems if not managed well. With the best will of the sponsor and managers to be true participants, it would be reasonable for me to expect that the other participants will be behaving and engaging, from their imagoes, in the workshop with their managers in the organisational roles both parties hold (Berne 1966, Hay 2009). This will influence the level of participation and engagement in the workshop for all involved. I will build into the contract how this will be managed, for example, I will ask as part of the contract with sponsor and coach/trainer participants for

them not to use personal examples in feedback, discussions and activities.

The sponsor and I met to contract (evidence 3), knowing that the contract would not be complete until I contracted with the coach/trainer participants on the day of the workshop. We agreed a shared understanding of the work to be undertaken and the relevant stakeholders to contract with, knowing involving all parties is key to the success of the multiparty contract (Hay 2009).

I shared with the sponsor my contracting template diagram adapted from Hay (2009), which I use for organisational work as seen in figure 1 below. This will keep us focused, the sponsor having a dominant Try Hard Working Style (Hay 2009) and mine being Hurry up. I explained that we were fulfilling the 'coach /trainer contract with the organisation' aspect of this three cornered contract keeping our eyes on the other corners as Hay (2009) diagrammed. The other two aspects of the contract 'the coach/trainer contract with the participants' and the 'participants' contracts with the organisation' are considered and agreed on the morning of the workshop.

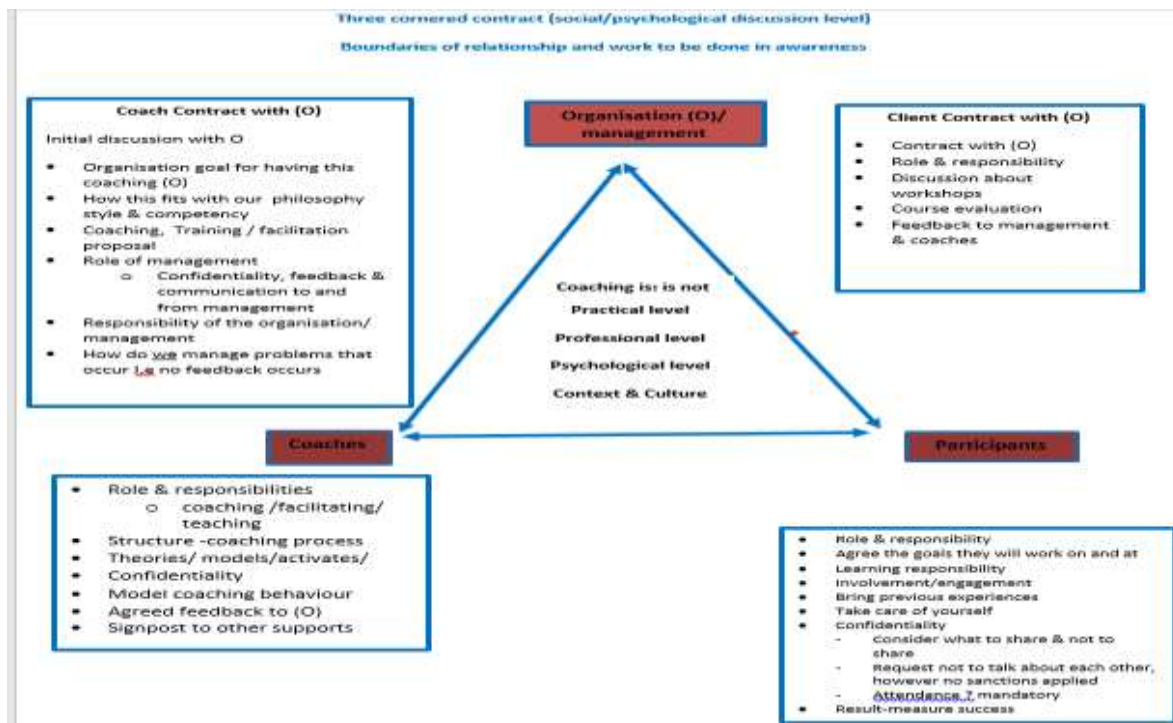


Figure 1 Three Cornered Contract

Berne (1966) wrote of the need to contract with organisations before he went onto describe contracting with the client, hence the contracting process starts with the sponsor on behalf of the organisation. Contracting is a major TA concept (Berne 1966, English 1975, Hay 2009) having been developed over time. Berne's definition (1966, p.362) of a contract is as "an explicit bilateral commitment to a well-defined course of action". A multiparty contract, which is what we will have for this work, extends the idea of English's (1975) three-corner contract, in situations where there are more than three parties involved (Hay 2007). This was a new concept to the sponsor. Her response to it, was eagerness to understand and interest to know about its use. Also sharing concepts and models in this way was new to her. Usually as a coach she would do the model in her head and not explain it to the client. Supporting the client to understand in this way she reported as 'empowering' as she was experiencing for herself.

In our contract, the parties who had a role and responsibilities were: me the facilitator/trainer, the sponsor leading the development of the programmes, both our organisations and our respective managers, the participants attending the workshop, their managers, employees who will attend the participant's programmes, their managers, our respective membership associations and our supervision processes. The sponsor and

my responsibility at this stage is to surface as explicitly as we can the psychological level bringing concerns and areas for action, into awareness, where they can be discussed or dealt with at the social level (Hay, 2009).

I drew out the diagram (Karpman 2019) of interlocking triangles, demonstrating the stakeholders involved in the contract, demonstrating an equal balance (Micholt 1992) between parties as seen below in figure 2. It showed us the integration of the various 'triangles' and how they are connected in the overall contract and showed the relationship between different stakeholders. The sponsor could see, for example that this included the line managers for the employees attending their programmes and their leaders. We considered their needs and expectations, for example, they may not want their staff attending to learn about a subject they may know little about such as TA, they might not want their staff attending to learn a subject that allows you to analysis them. The Institute of Developmental Transactional Analysis (IDTA), of which I am a member, ethical statements tells us, where the contract is three or more sided the member will at all times act to maintain clarity and transparency for all parties involved (IDTA 2005). Therefore, I have an ethical responsibility to have the sponsor have an awareness of all parties directly or indirectly involved in this contract, so that we have clarity and transparency and plan to maintain it, even if we are not directly

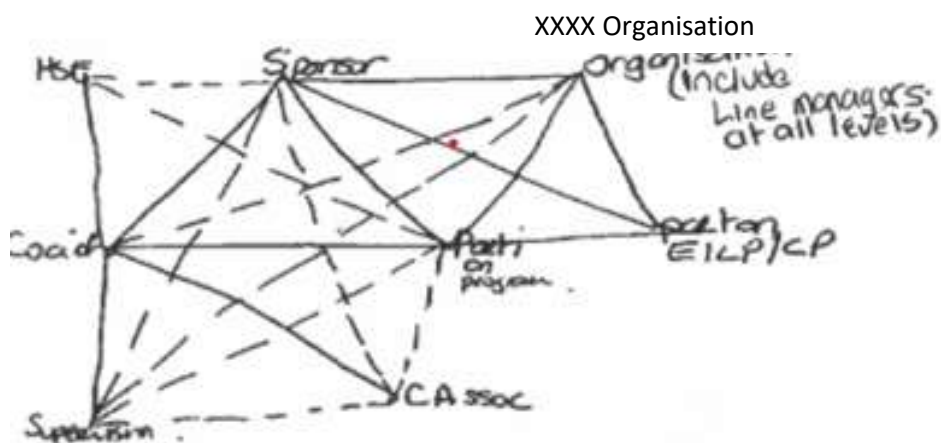


Figure 2 Multiparty Contract

involving some parties. This included taking into account the organisational policies and leaders in different roles.

To contract with sponsor, I use Hay (2009) levels for contracting rather than Berne types (1966) (procedural, professional, and psychological). Although the psychological level is referred to as a level of its own, I consider it in at the other two levels, at all questions asked and information given. For example at the professional level, when I ask what support pathways have the organisation if I notice that some participants need some additional support, might at psychological level, be perceived by the sponsor as me thinking that they are not capable or the organisation is problematic, therefore I explained why I ask this question as the sponsor did express surprise at me needing to know. I also explained it forms part of my code of ethical responsibility to protect the client and is in keeping with practicing from both ICF (2019), IDTA (2005) & EATA (2011) codes of ethics to be able to signpost to other interventions and resources. The psychological level which is already present when we contract, may interfere with the ability of the client to access their here-and-now Adult ego state in order to make a genuine contract. The above did seem that I was working harder than the sponsor, however I did not feel resentful about sharing the tools of contracting which can be an indication between facilitator helping and inviting dependency. Steiner (1974) tells us to watch out for Rescuing with a capital R. My intention was that the sponsor would learn about contracting by experiencing it and would assume responsibility for her development or not in the skill after our work together.

I encourage using my Nurturing Parent ego state and invite the sponsor thinking using her Adult ego state by asking questions on expectations, responsibilities, roles, experiences and beliefs that might impact the delivery of the workshop from an organisation, managerial/leadership and/or employee perspectives. This allows the sponsor check for the requirements of the

stakeholders and consider what might be important to them and be accounting rather than discounting (Schiff & *et al* 1975). Good contracting at the psychological level will have less chance of hidden agendas creating problems and more chance of noticing the potential pitfalls and avoiding them, such as the managers being participants on this programme. The intention in the workshop with the coach/trainer participants is to discuss how having managers and those that report to them as participants at the workshop might interfere with contract, bringing this to the social and conscious level for discussion. By taking charge of the contract with the sponsor in this way I am taking care of my ethical responsibilities within the contract and encouraging the sponsor take care of hers.

In their literature review Gellert & Wilson (1978) emphasise it's important the contract clarifies the goal. They also emphasise the goals are not seen as problems, so that the participants /clients are working on a goal, not on the problem. The goal of the contract is for me to teach the coach/trainer participants some TA theories, models and concepts so that they learn TA and can then:

- Apply the concepts to themselves to enhance their training and coaching skills
- Apply some of the concepts to the curriculum (handbook) of the leadership programmes (evidence 4) they will be teaching thereby enhancing their effectiveness
- Share with their coaching clients and programme participants i.e. the employees, so that the employees can use them to enhance communication, relationships and possibly impact the organisation's effectiveness and achieve its purpose.

I shared with the sponsor the TA training I offer is based on the philosophical assumption of TA of OKness, (I'm OK You're OK), each individual taking responsibility for the decisions they make and every person has the potential to grow and develop (Schmid 2008, Ohlsson 1988, Mountain & Davidson 2011,

Steiner 2012). The coach/trainer participants become partners with me, the trainer, who will demonstrate respect for their person and the experiences and skills brought to the workshop. I explained to the sponsor that I would be sharing this philosophy with the coach/ trainer participants on the day of the workshop also so that it can anchor our contract together. By working in this way, I am adhering to my Codes of Ethics and the values that guide my intentions. EATA (2011) Codes of Ethics tell us ethics is a discipline that makes explicit the basic values that guide thinking and behaviour of human beings and that values come from an existential and philosophical perspective, and hence are universal and transcend cultural norms. De Graaf & Joost (2011) discuss how ethics is complex in organisations. From these values emerge a set of ethical principles, of which the main ones listed are: respect, empowerment, protection, responsibility, and commitment in relationship. The TA philosophical assumptions are in themselves merged closely with these guiding ethical principles and if I adhere to one set I am adhering to both. The sponsor let me know that she had not considered her coaching association Code of Ethics in a while and this was a good reminder. I explained there was no judgement, however I would take it as bench mark for the coaches on the programme and would explain to them also how I work with my ethical responsibilities and codes to guide our contract of work together.

Based on the context of the organisation, the goals of the contract and my knowledge and experience of TA concepts I offered to complete sessions on DTA (Hay 2009), referring to the development of TA and its schools, providing a context for what the coach/trainer participants plan to teach on the leadership programmes and on major TA concepts such as Contracting, Strokes, Ego states (Berne 1961) and Working Style/drivers (Hay 2009). I informed the sponsor I was not an expert in TA and am in a developmental phase, currently undertaking the modules for the Masters programme in DTA. I let the sponsor know I understand my ethical and

professional responsibilities that continue beyond the termination of the contact, to include the continued confidentiality on terms agreed and not to use the relationship we are forming now to meet any other agendas on both our parts.

As this way of contracting was new for the sponsor and a new way of working, I built in time for questions and comments. The sponsor appeared to have a Try Hard Working Style from my observation, she was very enthusiastic, very interested in TA, used words like try, 'don't quite get it', appeared to be trying hard to understand at times, unusually dressed with bright coloured blouse and finger nails coloured, each a different colour. She told me that this was a new way to get your nails done. There were lots of gestures of 'trying' almost straining to hear.

As people with a Try Hard Working Style are often more committed to trying than succeeding, I went through the plan for the workshop and afterwards. She had got a firm commitment of support and finance from the leadership team and she was very much of the impression, the trainers and coaches were very keen to be involved. She had formed a development committee with several of the coach/trainer participants having different lead roles in developing the programmes. I was confident that the workshop would happen, even if her interest waived. I asked if she had other projects running at the time and other than being lead for the development of the coaching service in the organisation, she didn't. As planning is key when working with a sponsor with a Try Hard Working Style, I asked what her view of success was and she described how the coaching service has been one of her key successes. She had worked with a coach and she offered her learning to have been, to stick to a realistic plan and not get side-tracked as she can easily. This information was useful and we set about putting together a good plan of how we would communicate and operationalise the details of the workshop. I was clear I was not her coach. This was a contact between us for me to deliver a TA workshop.

As discussed above the sponsor intends to attend the workshop for her learning, as did her national manager and two other regional managers, who were coaches within the organisation. I took time to discuss the implications of this, as it would influence our contract and its outcome. She outlined she was willing to be a participant who was committed to learning, engaging and applying the TA concepts to her practice. Her intent was clear. As an overall contract I had therefore a contract with the sponsor, as the sponsor or commissioner of this workshop, on behalf of the organisation, which included the national manager and regional managers and I also had a contract with the sponsor and those managers as participants at the workshop. I was aware that this was complex and without good contracting at all levels with all parties, the workshop would not be successful. I therefore outlined to the sponsor how this would happen. Examples of this were:

- If a management issue is raised by the managers and/or coach/trainer participants in the workshop it would be stopped and they would be reminded of our contract.
- Confidentiality was agreed and I made the sponsor aware that what was discussed in the workshop could not later be taken up as a management issue unless it was illegal, unethical or referred to poor practice. I would let the coach/trainer participants know this also. We both had an obligation under organisational policy to take anything illegal, unethical or poor practice to the HR manager of the organisations for action. I would not take back any other information to my organisation other than stated above. I would agree confidentiality with participants on the morning of the contact also. I discussed with the sponsor that if I breached ethical, legal or professional standards or they had a complaint about the workshop delivery or my behaviour, they would take it to their HR manager and my HR manager for action. We agreed outside of this I would not discuss

information I learn about the coach/trainer participants or the organisation during the workshop with anyone else. I got agreement to use the workshop for my portfolio. I would check also with the coach/trainer participants on this. The sponsor and participants had to know I could not guarantee they would not talk about each other or different aspects that come up in the workshop.

- As part of the confidentiality we agreed feedback to the organisation via the leadership team would follow the completion of the workshop and would be an evaluation of its effectiveness in terms of what the coach/trainer participants would now be including in their leadership programmes and not a discussion on what came up during the workshop, for example if trainers complained about leadership team the organisation, etc. If something came up that required additional resourcing or was a major problem on the day of the workshop we would agree what and how it was fed back.
- The sponsor has responsibility to manage her different roles. I let the sponsor know that the sponsor or managers would not get preferential treatment, they would be treated in the same way as the other participants on the programme. Although we had a relationship now as sponsor and facilitator, on the day our relationship would be participant and facilitator. I had this conversation so that both our imagoes would make the necessary adjustment on the day of the workshop. Also there was a realisation for the sponsor that although she was on the programme as a participant, that her role as sponsor would also be with her, if for example on the day of the workshop she thought I was incompetent or unethical she would use her role. We talked through a few scenarios on this. We are as Schmid (2008) refers to working with our different levels of shared frames of reference (Schiff *et al* 1975) that build up into shared realities. If we don't get a

shared understanding on lower levels we may have problem at higher level. Therefore her organisational role as regional manager and professional role as lead coach and now representing the organisation in the sponsor role for this contract and final role as participant at the workshop will demand what Schmid refers to as 'stable communication' between the different roles so that she can have awareness that she is involved in many roles with different responsibilities and different boundaries. I have awareness that I will also switch boundaries in my role with the sponsor in her different roles as participant and sponsor. I have used different ego state systems in our conversation. I have in the here and now chosen to use my Parent ego state to reassure and encourage and be very clear about my boundaries. This has invited the sponsor to use her Adapted Child ego state, smiling a lot, being respectful and also her Natural Child ego state by demonstrating her excitement, telling me how excited she is and occasionally some nervous laughter and once spontaneously, clapping her hands as she stated 'this is great'.

- I advised the sponsor
- I would let the coach/trainer participants know not to share information they did not want the managers to hear or visa versa.
- I would ask the coach/trainer participants not to use personal examples or refer to colleagues in name or in personal contexts, that someone could guess who they were talking about as their managers were in the room.
- I would ask the coach/trainer participants to use activities only relevant to the goal of the workshop and appropriate to a work related workshop.
- That relationships may be well established that are based on Parent-Child ego state channel of communications, manager to subordinate and I would be inviting participants to think for themselves using

their Adult ego state to develop their skills as trainers and coaches. This may be different to how they normally work together and will be part of our contract discussed at the social level.

The contract with the sponsor raised many discussion points, which meant that I had brought many parts to the attention of the sponsor; however I know there will be aspects that have been discounted because at some stage we both will have been in script (Berne 1961). I had shared the contracting concept and as it was in a one-to-one situation, the sponsor had engaged with it as a new model to work with. I couldn't be sure the sponsor would translate it into practice. I might have had a 'fantasy expectation' as described by English that she would as I really wanted this to be the case.

There was a section here entitled Analysis , including material about: Leadership, Culture, Imagoes, Choosing TA concepts

Legal and ethical considerations

Finally, I will have to check that my contract is legal and in doing so I will also be paying attention to my ethical responsibilities. Steiner (1974) likens TA contracts to legal contracts, proposing that they should include the four basic legal requirements of mutual consent, consideration, competency and lawful intent.

Mutual consent: I believe the sponsor has a clear understanding of what is being offered and has accepted this. I believe I know clearly what I am offering and no other intent. I have worked out some of the boundaries through the above analysis and supervision and am prepared to handle them responsibly. I believe the sponsor's Adult ego state, understands responsibilities and boundaries of the contract and is prepared to have her frame of reference challenged, in this instance around her and the participants belief and attitudes about TA. I have supervision organised if issues comes for me where my frame of reference might be challenged especially in regards to the different levels of employees at workshops. In the contract, I have discussed with the

sponsor the role of supervision and the supervisor's commitment to confidentiality and her legal and ethical standards.

Consideration: refers to each party putting something of value into the contract, usually means payment. In this contract the participants are being paid to attend in their work time and paid travel which is an input of value from the organisation's point of view. The value the participants put in is their time, attention and commitment. The value for me is in providing a service and I get paid a day's work. I also get value in practicing my skills and getting feedback, advancing my learning.

Competency: I have let the sponsor know by undertaking this workshop I will be increasing my competency. I am competent to provide this workshop to the level we have agreed. In applying developmental TA I am aware of the boundaries and when to refer clients or signpost to other resources and pause the workshop if a dynamic occurs that is unmanageable in the here and now. Having worked with the sponsor on agreeing this contract I understand the sponsor and participants have the ability to access their here-and-now Adult ego state in order to make a genuine contract.

Lawful intent: my intention is not to be in violation of the law or against public policy or morals, in this case, this includes organisational policy and the law of the land and Codes of Ethics. I expect the participants to adhere to their policies and Codes of conduct and ethical professional codes. I adhere to the Codes of Ethics for EATA and IDTA. We behave ethically when we are fulfilling our potential and accounting for this for others, which is my intention through the workshop.

Other ethical considerations

The sponsor had let me know that ethical considerations were rarely discussed in the provisions of the training or coaching, however she was keen to report this did not mean they were not ethical. Thinking about their ethical responsibilities she referred to them as a 'given', 'we know we have to be ethical', such as, do no harm, do the right

thing, provide benefit to the client/participant, give and expect respect, work with informed consent, be confidential and have standards for safe guarding practice. By us having this discussion as part of our contract we are clearer about our ethical responsibilities and considerations and how they impact our contract for example we agree confidentiality. In having this conversation we are also surfacing the psychological level beyond assumptions and typical behaviours to a common understanding in regards to considering our roles ethically. In organisations, I suspect the sponsor's view is common place and ethics is not generally talked about until something goes badly wrong. What struck me is the dichotomy of not talking about ethical responsibilities and considerations and yet if someone accuses us of being unethical it is felt as a core value and a major breach of our professional role and practice. I discuss under planning how I will consider my role ethically.

Other sections were included here about aspects such as Planning, Working with Permission and Protection, Groundrules, Workshop Content

Contracting with Participants

After the housekeeping, introductions and ground rules, I commenced the contacting session, where the group got to contract with me the facilitator for the workshop. I addressed the remaining two aspects of our three cornered contract, within our overall multiparty contact as seen in Figure 2, that is, the coach/trainer participants' agreement with me as the facilitator for the workshop and their contract with their organisation as relevant to the context of this workshop and its expected outputs. This takes into consideration at a psychological level aspects of the other parties to the contract who are seen in figure 2. Role modelling TA concepts in action like this was my intention throughout the workshop and an integral part of my role as a trainer and facilitator.

I explained my intention for this session was to combine some theory on contracting, to activate the participants' Adult ego state and

some practice to motivate the participants Child ego state and give proper examples so their Parent ego state could check if it was all right to use the concepts/models. I would also welcome any example they had to share. I explained we would contract for the workshop at three different levels (Berne 1966, Hay 2009). I outlined the session content as the following:

- Defining contracting as a major TA concept (Berne 1966)
- Some theory on the various kinds of contracts, one-to-one, third party (English 1975) and multiparty (Hay 2009) from a TA perspective
- Theory on the different levels of contracting which was defined originally by Berne (1966) as phases and the term changed to levels and added too by Hay (2009) for organisational TA
- Completing the contract for the workshop with the coach/trainer participants

I checked with the participants if the session outline sounded reasonable and asked if there was anything specifically anyone wanted me to cover in the theory, encouraging them to have their own learning goals. My question emphasised we are at a workshop where the participants are expected to think for themselves, knowing they have some experience of TA, of how much I was not too sure at this early stage.

I invited the participants to ask for what they wanted also, inviting transactions from their Adult ego states (Berne 1961). One participant asked for me to share how I used contracting as a coach with my clients. I agreed to do this briefly by giving anonymous examples in the session. This may be a logical request or might also be an invitation to Rescue. To stay off the drama triangle (Karpman 1968) I said 'by the end of the session you will see the format I use and can take what you like for yourself and I can also signpost you to further reading'. This supports the philosophy I built the workshop around 'you can learn here today', and 'we are partners in this workshop to meet the goals of the contract'.

For the theory part of contracting, I defined contracting using Berne's definition (1966, p.362) of a contract as "an explicit bilateral commitment to a well-defined course of action" and James & Jongeward (1971) definition as an Adult ego state commitment to oneself and/or someone else to make a change'. I had a PowerPoint slide with Berne's definition on it (evidence 6) for those who like visual aids. I referred to contracting as a major TA concept belonging to the Classical school of TA (Berne 1966), which we would cover more in the next session. By referring to ego states and schools of TA in this way, my intention was to integrate the TA concepts and context throughout the workshop. The contract is an agreement for how the parties will work together and for what work is to be completed. It provides a framework for all parties to operate in the 'here and now' in their Internal Adult ego state (Hay 2009), using useful information from their Internal Parent and Internal Child.

The contract TA concept has been used across all schools of TA, with the emphasis on contracting being placed differently, for example in Cathexis (Schiff *et al* 1975) the client may not be able to make a contract at the beginning of the intervention, in Constructivist School (Allen & Allen 1997), the transformational dialogue leads into the contract.

Linked to the definitions, I invited the participants to share their experience of contracting as trainers and coaches. There was hesitancy and for a few seconds no one said anything. By asking this question, at this stage I may have discounted the significance of managers being in the room at this early stage and in thinking of Hay (2007) Steps to Success I dropped back down a level from 'significance' to 'situation'. I transacted from my Nurturing Parent ego state to their Child ego states, linking the question to the participants earlier sharing of their familiarity with ground rules for their sessions, encouraging their Child ego state to allow participation. I explained ground rules forms part of contracting which is useful. However, often in my experience ground rules, may

only cover contracting at the practical level and not necessarily at the professional and psychological levels. This allowed me to explain the three levels, use examples for each level, and the different types of contracting as stated above (Berne 1966, Hay 2009) to provide understanding.

The participants joined in the discussions, acknowledging that the psychological level was not an aspect of training or coaching they were familiar with, and could see and hear its importance. However, in the discussion, they reported how they would ask for expectations at the beginning of their programme now realising they were somewhat addressing the psychological level out of awareness and now understanding its significance more, especially the unspoken expectations, rumours, fantasy, and/or myths of participants.

This allowed an opportunity to talk about how we address unrealistic expectations. English (1975) found that because the initial contract was with the organisers, audiences often had unrealistic expectations, alluding to workshop participants unrealistic expectations 'as a tendency of human, the Child'. She talks about fantasy expectations and encourages expression of these in order to clarify they wouldn't be met. I asked if they had any unrealistic or fantasy expectations that they thought might be met at this workshop. I was now working with the psychological level of our contract. Some mentioned me coming on their leadership programme to teach the TA part, others said 'knowing everything about TA', 'writing their manual', and others said 'changing the culture of the organisation'. We talked through some and considered what was realistic for a one day programme.

Multiparty Contract

To explain the three cornered and multiparty contract and complete our contract together, I drew a triangle, on a flip chart, of our three cornered contract (English 1975). I drew the organisation at the top corner and me and participants on the other corners and then drew other triangles (Hay 2009), showing how our three cornered contract links with other parties that are part of or influenced by this

contract, making it a multiparty contract. Each party to the contract has a role and responsibilities, either directly or indirectly to the workshop. Hay (2009) refers to this as the 'Kite' theory of contracting because there are a series of three cornered contracts between the parties. The kite can be pushed or pulled in any direction, easily influencing that aspect of the contract negatively. I gave the participants a handout of the contracting template I had prepared to refer to also (evidence 12).

I explained a psychological level (Berne 1961) contract will already exist with each stakeholder, including the participants in this workshop and by considering the parties' roles, responsibilities and expectations, as well as our own, we can bring issues to the social level, into the here and now, and consider options and plan how to manage them.

Issues from an organisational perspective within the multiparty contract, such as employees being sent to their leadership programmes, employees from different departments on the programmes who don't get on, employees who don't want to learn TA, and the organisational leadership expecting some great transformation as a result of the programmes were discussed. The participants were gathering the different parties' perspective and figuring how they influence our contract and what is required of our contract at the social level to prepare for and manage some of these. The various contracts, with the different parties of the multiparty contract, had surprised the participants and I could hear them reflect on, for example, how the participants on their own programmes would be impacted by our workshop today, beyond the TA content. They were making the connection between this workshop and their programmes beyond content and thinking about applying what they were learning i.e. this contracting concept in their programmes and practices.

They gave an example of deciding to give a brief discussion at the beginning of their leadership programmes as to what brought the employees on the programme, what was

their special reason for being here and being ready to invite into the conversation, at the social level, the ego states of the employees who are 'sent' on to the programmes, saying something such as 'if you have been sent here today, consider what you might get from being here, knowing you may not really want to be here' or 'if you feel like rebelling please save it for break time and rebel with me over tea or coffee. In this way, they are using their Adult ego state to invite the Child and Parent ego of participants to the programmes, to be reassured, approve of and have permission to engage.

The coach/trainer participants were intrigued by this way of working as they explored and experienced it from a participant's perspective themselves and demonstrate through asking questions, getting clarify and giving feedback and that they are willing to try it out later (Clarke 1984).

To complete the contract, I worked using the three sides of the triangle, explaining we would now for this workshop agree our roles, responsibilities and expectations at each side

of the triangle. Firstly, I explained my contract with sponsor, as a representative of the organisation, in terms of the contract with the participants and other parties, where she had to take into consideration their requirements, the organisation philosophy, goals and its values. I explained the sponsor had contacted me to provide the training. We had an initial conversation about TA and my experience, competency and philosophy and the sponsor decided, as this fitted with the organisational goals, we would run the workshop. Before we agreed this aspect of the contract, she had checked with the other regional managers and got agreement from the leadership team. I explained we had agreed on feedback to the leadership team, as that of the workshop being provided and that some TA concepts would or would not be offered as part of the leadership programmes following the decision making process of those present at the workshop. I wanted to be clear we were not having any other conversations with the leadership team that might be viewed as an opportunity to tell stories about the participants at the workshop.

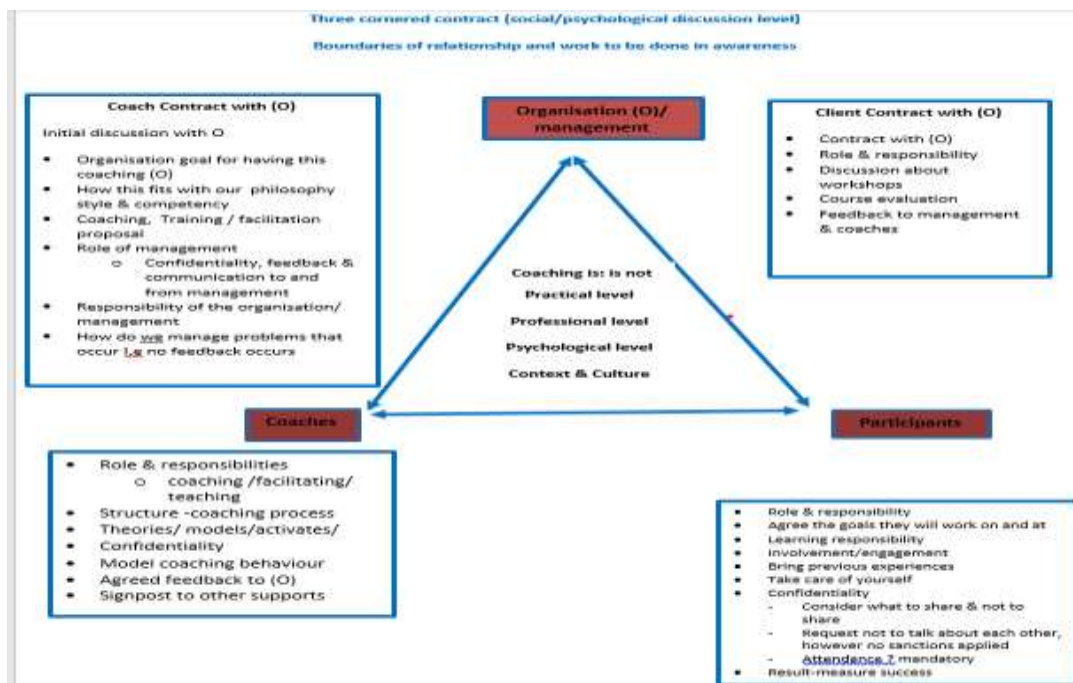


Figure 4 The three cornered contract (Figure 1 repeated for easy reference)

I explained what we had contracted regarding confidentiality, feedback & communication to and from management as above also, discussing both our responsibilities in upholding this contract and finally how we would manage problems that might occur such as unrealistic expectations or disagreements. I explained we had agreed confidentiality, as what was discussed in the workshop could not later be taken up as a management issue, unless it was illegal, unethical or referred to poor practice. I let them know I was telling them this now so that they note what they share and make a decision, to make it appropriate, to a one day workshop, knowing there are three levels of employees present and at one of those levels is their overall manager, the national manager. I explained under organisational policy we have an obligation to take anything illegal, unethical or poor practice to the HR manager of the organisations for action. We had agreed I would not take back any other information to my organisation other than stated above. I had agreed as part of my contract with the sponsor I would agree confidentiality with the participants on the morning of the contact also, which I will do now as part of the next aspect of this triangle. I explained I discussed with the sponsor that if I breached my ethical, legal or organisational responsibilities or if anyone in the workshop had a complaint about the workshop delivery or my behaviour, they could take it to their HR manager and my HR manager for action.

I explained I had got agreement to use the workshop for my portfolio. I now checked this with the coach/trainer participants also and got agreement. By letting the participant know my contract with the organisation through the sponsor, I was aiming for equilateral psychological distance (Micholt 1992). I explained the sponsor and I contracted at the three levels (practical, professional and psychologically) (Hay 2009) and agreed on a teaching /facilitation plan and the goals for the workshop, knowing that I would also be contracting with participants for their agreement to the contract at the workshop as we were doing now. I talked about the sponsor now being a participant on

the workshop and some of the ways this might impact the workshop, all the while, surfacing the psychological level of our contract. I shared with them they might think the sponsor and I were closer than I was with them, as we had conversations already, they might think the sponsor might have told me things about them, I might have formed a view of them as a consequence of our conversations, I might be teaching them what the sponsor told me to teach only, the sponsor might have told them things about me. I reassured them that none of the above was the situation, to my knowledge.

The participants found this really interesting and let me know that this level of transparency was unusual. Some of them said they felt uncomfortable with it. This was a good opportunity to get an understanding of surfacing the psychological level of the contract, as some of the participants agreed they did wonder what the sponsor and my relationship was and how influenced I was or the sponsor was. By talking about what their discomfort was and although some participants offered other participants reasons for this discomfort, which demonstrated some Rescuing, overall the consensus was that we were talking about what was not being said i.e. wondering what the sponsor had said about them, what I heard about them etc. bringing this to the social level from the psychological level was a really useful way to demonstrate levels.

I talked about there being three levels of employees at the workshop and how the managers including the sponsor, would not get preferential treatment. All participants ought to expect to be treated as equal in their role as coaches and trainers here at workshop. I gave an example under the practical level, I explained I had asked the sponsor for the workbook they were preparing for their programmes and under the professional level I would be offering some guidance and assistance to enhance the workbook in regards to what was written on ego states. Under the psychological level they may be thinking I was judging their work which might offend them. I said 'let me

explain, I am not 'judging' their work or performance, ego state models are very confusing and I still struggle with them, so I was offering them my experience and understanding of sharing the ego states concepts and what works for me'. After that they can decide if it is useful or not.

I then explained the bottom of the triangle was the part of the contract we create between us, me and the coach/trainer participants at this session, for the workshop, inviting each of them into their role in the workshop. Somethings within the contract had been decided with the sponsor i.e. we are here today, the programme content is broadly decided. We also had covered some in the conversations so far in the workshop, i.e. the ground rules and confidentiality. The contract with me and them had begun with us agreeing ground rules. This now was an opportunity for them to influence the day and get what they wanted by being here, giving up a day of their busy lives. I endeavoured to invite and engage their ego states even more, acknowledge their getting here and feeling heard. As part of this aspect on the triangle, I outlined my role, responsibility and expectations as part of my contribution to our contract as discussed earlier. I agreed not to share any information outside of the workshop that is shared on the day. I told the participants I could not guarantee they would not talk about each other or different aspects that come up in the workshop, as only they were in control of this. My expectation was they would make a decision about this themselves.

I let there be 'long' pauses to allow for questions and comments frequently. I say long because to others it may seem like a 'normal pause' but from experience it will seem long to me and that is what I want to be aware of. I had strategies to use my Nurturing Parent ego state from caring and not Rescuing, inviting Adapted Child behaviours, from the participants such as reminding myself that people can take care of their own needs and ask for what they want. Over time, as I have learned TA and apply the concepts in my practice, I notice less and less of my script behaviour and as such my biological and

psychological hungers not needing to collect the strokes in this way (Berne 1961), now being more pleased with my planning and slowing down, providing me with strokes in a more healthy way.

I asked them to consider their role, responsibilities and expectations as participants as part of our contract. I heard some deep breaths and got examples such as responsibility to learn, to participate, to engage and to be present. I asked what they needed for this to happen and what might get in the way, knowing the goal is to learn TA, to teach some on their leadership programmes in the organisation. The coach/trainer participants used this as an opportunity to talk about how it impacted them to have managers in the room and how useful it was for all the participants to be able to have a conversation about this. For some participants the sense was that the managers would take responsibility not to behave as managers and subordinates not to behave as subordinates, which would mean they would not use Adapted Child ego states in the negative, such as Withdrawn Child, Compliant Child, Rebellious Child (Oller-Vallejo 1986) (last two referenced to Ernst 1971 and Drye 1974). The general consensus was to view this as a developmental opportunity and be aware of what is shared. The managers expressed relief at hearing this and explained they wanted to be here to learn, ask questions, disagree and not worry about getting things wrong, which they knew they would and wanted to celebrate their learning. They agreed not to talk about each other at breaks or on return to work. If anything unethical, illegal or poor practice was shared it would go back through the HR management structure of both organisations and the participants wanted agreement that they would know if anything was been taken back by informing the group here first. This was a useful request and we agreed.

It appeared most were willing to be here and eager to learn. Also, not all the coaches and trainers in the organisation had come and therefore it seemed that those that did, made a choice for their own reason to be here. However, knowing that they were a number

of participants who have a possible Please People Working Style, there is a good chance they were pleasing or seeking approval by being here. Most told me they were curious to check in with what they knew already and to update it and they were already getting new information. Also there were some participants with Try Hard Working Styles who might be looking for new angles and I might get very enthusiastic with them so it was useful for me to remind myself of my responsibility to provide structure and not go off on tangents. The participants with a Be Perfect Working Style often ask for more detail and I had various handouts and a reference list where I can sign post them too. I also offered if it seemed we were spending too short a time on an aspect for any participant, to catch me at break time and we could talk in more detail.

The last part of the three cornered contract referred to the coach/trainer participants contract of employment with the organisation, being paid to be here, being freed up to be here in the workshop, with an expectation by their organisation's leadership team to provide its employees with several training programmes. Some expressed some worry about this now, as they worked through this session, they felt or thought that they might not have enough knowledge and experience to do this as there seemed to be a lot more to TA than they thought. So as not to discount this, we talked about what the coaches were experiencing in their Child ego state and possibly in their Parent ego states depending on what their Parental messages are and also in their Adult ego state, they may need more skills and practice.

On Hay's Steps to Success model some participants sounded like they were at skills step where they thought they lacked the ability, not all though were at this step and therefore the conversation was useful to see and hear perspectives from each other. Discounting (Schiff *et al* 1975) at one level often means discounting at all higher steps (Hay 2009). I asked questions that brought them back to the 'situation' step, where they had agreed as part of a new suite of leadership programmes to provide TA

concepts as part of the programme. In the workshop they are understanding the 'significance' of this and deciding on some solutions, the knowledge and skills they might need. I heard some stuck at 'strategies' step, in that they know they can learn but they saw it as they do not have the time and for others it is about committing to a plan and getting motivated, to be a part of this, even more than they were at the beginning of the workshop. As part of this contract we agreed to check in with what they were experiencing in their Child ego state, regularly through the day and what parental messages were influencing them in their Parent ego states, asking question like 'who thinks that', what is the influence here, and using their Internal Adult ego state to check between states for useful reality checking answers, 'is this really and truly an accurate reflection of where you are at right now', 'what more do you want and need to be competent/ to be ready?' 'how can you be responsible for addressing this need?' Checking in like this will account for the psychological level of the contract and brings some more of it to the social level, beyond this session. As such we are addressing this level throughout the day. Schmid (2008) reminds us it is important to understand responsibility to avoid dysfunctional symbiosis.

We also discussed as part of the contract their evaluation of the programme for the organisation and for me, and how the organisation would get feedback from their evaluation. I had an evaluation form to complete at end of workshop that I explained was for me to continue to develop this workshop. The sponsor agreed she would provide information on the programme in her yearly report of activities, such as how many attended and a sentence on its usefulness.

I felt we had a good contract from the dialogue, throughout the session and the coach/trainer participants seemed pleased to learn about contracting and could see, hear and feel how it is applied. I gave an example of how I used contracting with my clients in one-to-one coaching, they were surprised that it could take up to an hour to get agreement. I have a template that I work with, which I

shared with the coach/trainer participants, explaining the aim is that both parties understand our roles, responsibilities and expectations on the work to be done and how we relate to each other. I offered that I consider most questions on the template at the psychological level to surface as much as is possible to make for a better contract, although I had the psychological level as a heading on its own.

To give the coach/trainer participants an opportunity to try out the contracting process among themselves and apply and demonstrate what they had learned so far, I invited them to do an activity, considering the three different levels of our contract (practical, professional and psychological) and check if we had omitted anything important to them. The group divided into three small groups and recorded on flip charts (evidence 13) what they wanted to have included in our contracting discussion. Each group took a different level on which they gave feedback to the other two groups and took suggestions from the other groups to add in, if useful. I agreed my role to add in anything that might make the contract more effective and from my perspective (evidence 14). I observed them merge into the groups easily and there was a reasonable level of interaction in the room, as they discussed the different levels, which suggested they were moving to adjusted and adapted imagoes (Hay 2009). A few times they checked in with me and it was easy conversation. This may have been to check my role and where I fitted into their leadership slot and/or to please me from those with Please People Working Styles.

Some of the feedback was tending to slip back to ground rules, so it gave me an opportunity to meet their learning needs and reiterate what the professional level is about expectations, roles and responsibilities, about the goals of the work we must do together and what it is addressing in the organisation, the change they want to see. I encouraged them to use their experience and previous learning as trainers and coaches to consider even more of what their roles, responsibilities, and expectations might be based on what they had learned so far,

particularly focusing on the process of the relationships within the workshop. There were comments such as wanting to 'soak up a lot about TA'. I asked about this metaphor (Combs & Freedman 1990) of 'soaking up' and what their responsibility in this was and this generated some brainstorming of suggestions. It seemed like they wanted to be sponges and I would provide the water to the sponge.

Analysing this through ego states, I could work from my Parent ego, doing a lot of telling and they would be in their Child ego state, absorbing possibly without checking, in how they might apply it or how it was relevant in their context. Using the drama triangle (Karpman 1968), it could also be an invitation to Rescue from Victims, poor us, having to learn this now as well as all the other parts we have to do for the leadership programmes or it could be seen as me being a Persecutor of them in that I believe they should know some of this already and they could become annoyed. I asked about options of changing the metaphor of 'soaking it up' and working more as a partnership. They considered their responsibility to their learning less sponge like, such as they could give feedback to me, get clarity if they don't understand, ask questions, be open to applying the tools in the activities they will participate in, they could consciously choose to engage and sharing examples and experiences and I will learn from them and they from each other. One said this way of working together felt less like school and more adult. 'It took a bit of pressure off' which sounded like freeing her Child ego state. This discussion demonstrated that they had come to the workshop, in their imagoes with a possible psychological level expectation that I would provide them with lots of information/content and they would be recipients and not necessarily active in the process. This was also how they mostly experienced their own training, as one participant said 'isn't this how it usually is'.

I explained also the psychological level again, as some of the aspects on the feedback for the psychological level were not necessarily at this level. An example was the managers

being in the room, impacting learning and participants now feeling ok to say certain things and not be judged. Also another participant offered the request for fun during the day, this at the psychologically level, might be an expectation that this is not possible because there are managers here. It was important to reassure their Child ego state that there would be fun, and fun was welcome through creativity, brainstorming and laughter.

Berne (1966) at the psychological level referred to 'personal needs we are not aware of', therefore given that this level of the contract is out of awareness I added three more questions (James and Jongeward 1971) to prompt a conversation about some of the things that might sabotage themselves, knowing we all have familiar ways we sabotage ourselves. I explained this as the things that might get in the way of learning, of being present, of asking for what we need or want in this context to enhance learning, of considering other options and taking action.

- What if we disagreed with each other during the day, how would we manage this?

One of the coach/trainer participants stated, 'this is a difficult question to answer'. She told me they were not used to talking as facilitators in this way, being this transparent. Normally she told me her experience was that they would complain to each other at break-time if something went wrong or if they were unhappy with the programme not return after lunch. We got a commitment that these three things would not happen and if a problem occurred, we would resolve it or disagree respectfully in the workshop, giving permission to disagree, stating disagreement can be healthy and can challenge our frame of reference in a useful way.

- How will I know that the workshop is meeting their needs?

They suggested I could during each session and after each break do a 'check in' invitation asking how the workshop for everyone is. I explained I would be analysing, assessing and evaluating as I went along and would make

changes as needed. I would use a reminder of working within our contract if required. I would ask questions as an invite rather than everyone having to answer, so that the participants could take responsibility for their own learning, keeping with the ethos of TA to achieve autonomy. I am aware that those with Be Strong Working Style like to be told what to do and I may have to check in between sessions or at breaks if I notice they do not say what they want.

- How will they know they are getting what they wanted?

I invited the coach/trainer participants to check in with themselves how they are experiencing their learning and notice any patterns i.e., not answering questions, passing, getting agitated and internal dialogues. I encouraged them to congratulate themselves on noticing and check for even more insights and check in with me during the session or at break time with any questions they have.

As part of the contract I discussed ethical frameworks, from an organisational viewpoint and as membership of various association as discussed previously. Some coach/trainer participants were members of ICF. Some were not members of any association, their organisation has not required it. I explained the benefits of being a member, especially as coaching and TA are unregulated professions, in legal terms, in our country and internationally.

Part of the aim of contracting is have an agreement at the social level (Berne 1961) to assist the participants move through their imagoes from anticipatory to adjusted to adapted, to get the work done and get to attached (Hay 2009), as is appropriate for the workshop, to get a successful outcome. The participants signalled they had got some helpful information and there was a good chance still, as we work through this contract and get agreement that there were slots in the participant's imagoes not filled yet, particularly trying to figure out who is in charge, with the different levels of management present.

Throughout the session I was aware the sponsor and managers had engaged as agree as participants by asking questions, by easily working in small groups and by openly discussing aspects they found interesting and aspects they had not used themselves as trainers or as coaches. I analysed this as them giving permission (Crossman 1966) in awareness or out of awareness to other participants to express themselves and know it was ok to do so. Also it was an indicator of their potency (Steiner 1974) as managers that they were willing to learn and engage in a truly authentic way. It indicated a healthy level of psychological safety (Edmondson 1999) demonstrated by the common sense of some hesitancy at times where the participants weighed up their responses and checked internally is it safe, to express oneself without consequences. I heard one participant say 'I'm sharing this as coach to coach' and when I enquired what he meant by this he said he was reminding himself of our contract and how he is to behave at the social level. He was not a manager and although there could have been an ulterior message to the other person as a reminder also, he seemed to be doing this as a practice for himself or of course it could be to please teacher (Hay 2009).

I am been aware for myself to have a strong enough Parent ego state and structure well for participants to feel safe and potent to participate effectively. I referred to ground rules and contracting to make decisions and did not engage with conversation that occasionally side-tracked, staying in here and now, using my Internal Adult state, checking in with Internal Parent and Child ego states. I also demonstrated my Child ego state in action by letting the participants know that I was excited to hear and see their discussions and their learning explaining my Child ego state experienced this as an expectation for their programmes. In doing this I also stroked (Steiner 1974) them positively, acknowledging the positive strokes I was receiving. As I talked about this to the coach/ trainer participants I was linking the concepts together, analysing and assessing at the same time.

There was a final section on Evaluation & Conclusion

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IDTA recognises EATA, ITAA and ICTAQ qualifications within IDTA membership categories.

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Wording of email sent to ITAA BOT by Julie Hay on 15 September 2022.

"I am at a loss as to how you expect me to respond. I have been as constructive as I can be by suggesting some words that label what you all did as a 'misunderstanding' – you ignore those and send me yet another email with inaccuracies in it:

1. I did NOT legally cancel the conference. The 'customers' of the limited company (i.e. all of you) did that. You had already been advised – ITAA Treasurer is qualified as an accountant in the UK – that under UK law I had no option but to declare insolvency although by that time you also knew that the limited company was only about GBP 30,000 short of the money required to pay its debts (i.e. to give all refunds). I learned it was cancelled when I read the public announcement.
2. It was NOT ALL the associations making a collective decision – you had already cut out IDTA President and ignored the Contract that had been signed by six associations (as you appear to have forgotten, those were ITAA, IARTA, FTAA, UKATA, IARTA and IDTA). And if was collective, why are they silent now while you tell me I am dealing with ITAA only?
3. You DID blame me – you issued many public statements telling people that I was the person in control of what was happening, even though I was being overruled and/or ignored.
4. There was ONLY a sole director because the other directors who had set up the limited company chose not to be directors when we realised the financial problems due to covid. The company had been set up with three directors (from UKATA, IARTA and me).
5. You claim that it was my own decision to withdraw from the exams but what choice did I have when ITAA President had threatened me with an ethics charge. I needed to protect the participants, especially as I was well aware

that innocence is no defence within a TA association.

I note that you wish to have different truths. Presumably therefore you do not agree with the Schiffs' identification of the concept of discounting. I also find your quotation from the Code of Ethics interesting and I assume that Peter Rudolph is not a member of ITAA - accusing me of playing a psychological game, publicly, appears to be out of line with No.10. At least Vladimir told me that he only said it in a private conversation.

Also, I am puzzled that you are unable as a group to identify which three of you have not already been involved in unfortunate circumstances with me. If they do not wish to identify themselves, I have no desire to name them and put them into the difficult position of asking the rest of you to deal with facts, especially having seen how you dealt with Lynda Tongue when she attempted to provide you with some factual information.

This whole process seems to have been designed to prompt me to begin using social media again. I had stopped doing so months before you insisted on the meeting and I had closed down the 2020 website. I do however still own worldtaconf2023 and this lengthy process is prompting me to consider starting again with that. You can see the evidence documents I have at <https://www.dropbox.com/sh/cli3ntb0guolfoq/AACjT5d7wnzGVynySXp1SSj-a?dl=0> - I suggest you look particularly at how EATA website is still running the series of announcements blaming me that all of you put out in May 2020, and the email that ITAA Treasurer sent me assuring me that you would support a renegotiation, which of course you then refused to do, whilst at the same time announcing that you would, however, come to the UK in 2023. I will be adding the recording and the recent emails to the folder but you already have those.

You have my suggested wording and I cannot see any reason why you cannot respond to

me about that as a group. For instance, I can imagine that you would like me to remove the last sentence from the first paragraph, and to remove the names/signatures of those who took the cancellation decision who are not on the BOT. That appears to confirm EATA President's claim that ITAA took the lead in the decision, which you have elsewhere denied. In that case, perhaps you would like to suggest a change to the words to make it clear that only ITAA are, and have been, involved in this unfortunate process. Perhaps something to make it clear that ITAA BOT accept that, as the leading TA organisation in the world, you now realise that EATA, FTAA, UKATA and IARTA were just following your lead?

This final paragraph is included to let you know how frustrated I am feeling with this process! Maybe it would be easier to issue a statement that uses mine and Chitra's words during the 11 March meeting – *Even though we knew that under UK law we would lose most of the GBP 110 000 of participants' money still left in the bank, and even though it would have taken only a loan of GBP 30 000 to give everyone their money back, and EATA had 10 times that in the bank, and even though most paying participants, and the hotel, were happy to postpone the on-site conference until 2023, and even though we knew that the online conference was already organised and was free to all who had booked for the on-site and we had many extra bookings, and even though both on-site and online conferences had been organised because we asked for them, we cancelled both conferences because we didn't trust Julie Hay. We hope you all enjoyed getting only 20% back of what you had paid. We mostly had free places.*

Having written it, I have looked at it again and can confirm that it would be acceptable to me if you published it. During the meeting, I repeatedly told Chitra that I just want the truth to be told.

Julie"

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