

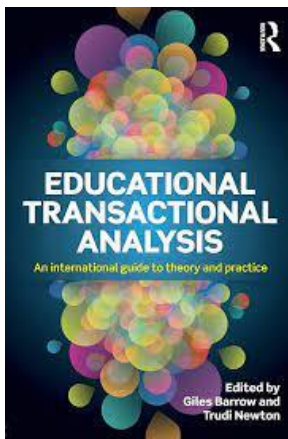
Teaching – Training in Transactional Analysis

(Edited November 2023)



Take a look in the mirror!

When I was a staff member on many of the in-person (impossible to replicate online!) TEW's, in finished my groups by inviting them to look into my briefcase - promising that they would find a great resources, one they could depend on for their future development and lives as TA trainers and supervisors. So, naturally they were all intrigued, just what magic did Dave have - a mirror. So, I hope these notes may be of special interest if you are preparing the TEW or preparing for the TSTA examinations. I also hope they open the doorway to further explorations.



“One child, one teacher, one pen, one book can change the world, education is the only solution”.

That quote is the start to the introduction to the excellent book “Educational Transactional Analysis” edited by Giles Barrow and Trudi Newton. It is a wonderful quote from Malala Yousafzai (UN Assembly in July 2012):

What an opportunity, a privilege and responsibility we have as TA trainers, teachers, and practitioners! TA trainers describe their understanding of Educational TA, some of whom I have been privileged to meet, work alongside, or to sit in their workshops. I am convinced that each has positively changed the world in many and various, large, and small ways.

Dave Spenceley TSTA brief notes on Teaching – edited October 2023

www.psihoterapieat.ro /// ytcitraining@gmail.com



While using more than one pen and one book, I have been teaching and training TA theory and practice since 1991. Initially in the UK, then in many European countries. For the past 16 years my work has mainly been in Romania, while the covid pandemic also forced us to go online, which then opened opportunities for those around the world to join with us.

I am living and practicing in Germany, having married a wonderful TA trainer who is actively involved in teaching and training in the counselling field of TA (Uta Höhl TSTA). As I write Uta is training a group of senior probation officers from around Germany who are meeting for 3 days of training and development.

As a trainer I have been privileged to work with many who have made significant changes in their lives, professionally, personally, within organisations and communities in which they live as a result of their training experiences. The world has been changed as a consequence and in turn several have gone on to become TA trainers, others teach and work in their own fields within and outside of the field of psychotherapy.

Relationship: All educational endeavours are relational. The relationship between the learner, their colleagues in groups and the trainer – coach – supervisor – mentor – consultant – psychotherapist – counsellor – teacher – mentor – is central and the key to all successful learning experiences.

In psychotherapy it is often said that the healing takes place within the space of the therapeutic relationship. “It is the relationship which heals”. So, it is equally true that all learning takes place within relationships, and it is the relationship which facilitates, enables, and shapes transformational learning.

How do we name what we do?

There is wide confusion regarding terms used to describe the training and educational process. In practice the term used to describe educational project depends on the frame of reference used within the system in which it is taking place.

My own frame of reference; the terms I use to describe my own work:

- Teaching has a relatively brief time frame. “this morning I am going to teach you about ego states” I am teaching when I am sharing a new theory, new ideas, new skills or sets of skills which the trainee is wanting to learn but as yet does not know or understand.

- Training has a longer-term frame. Possibly over a whole workshop or series of workshops in which the goal is for the learner to use professionally or personally over a period of time. This also includes relationships which last for years as people prepare to train as psychotherapists and the training relationship can last from the 101 to CTA examination.
- Supervision is a process of reflection upon the trainee's professional practices, an important element of training that ensures ethical, safe, and effective practice by the supervisee. I have written separate introductory notes on supervision.

If you ask a search engine to explain the differences between teaching, training, coaching, and mentoring you will be directed to various efforts to define the differences. Something like "teachers impart information" while "mentors help individuals apply their learning". (For example see - [What is the difference between a mentor, a teacher, and a coach? | by Dominique Falla](#))

Teaching that $1 + 1 = 2$ means little until the learner has understood and uses the knowledge effectively in their lives. Therefore, the question can be asked: At what point does teaching become training? (coaching / mentoring / supervising / consulting). If personal issues complicate the learning process and it is addressed by the teacher, it can be asked: At what point does the teacher become a psychotherapist / counsellor / coach? How are these roles differentiated?

We can qualify as a "Teaching Transactional Analyst" (TTA). However, it is usually understood that the role of a TTA includes "training" TA practice as well as teaching TA theory. Before the candidate can pass their TTA examination, they have to demonstrate they have a clear grasp of ethics, the international organisations of TA, including the examination processes, and TA theory. They must also demonstrate that they understand learning theory and can apply all this as they demonstrate their teaching.

In order to train and prepare for the TTA examination a "training contract" is signed. This training contract is with a qualified Teaching and Supervising Transactional Analyst (TSTA) who within the text of the contract is called a principal supervisor and in practice is frequently referred to as the trainee's sponsor. Therefore, we see that within the world of TA the roles of teacher, trainer, supervisor, and sponsor appear to be confusingly and inter-changeably used. The confusion can be cleared by using open communication and clear contracts regarding the various roles and responsibilities:

Once upon a time as I attempted to make sense of this, I asked an experienced colleague how they understood the difference between coaching, counselling, consultancy, and supervision. With a broad smile he asked if I was asking a supervision question, or maybe I was consulting with him, or was I asking for coaching, or possibly seeking training regarding the various roles. He also said that he could teach me to recognise the differences. There was a pause while I considered, he continued to grin

mischievously and before I answered he continued to tell me that I needed to be very careful because his fee depended on how I answered!

We went on to discuss how the system defined the term used. Within organisations usually people thought of consulting, for executives or mentoring for the shop floor workers. While within the helping professions people generally use the term supervision. Coaching and mentoring were often used regarding skills development, however coaching also includes life coaching and team development. Counselling was seen as being used more generally and within many settings, such as an accountant offering financial counselling with a differentiation being made between personal development counselling and counselling in specialist fields.

Psychotherapy is a term with a more specialised meaning, the EATA training manual describes psychotherapy as healing past experiences in order to promote autonomy and to live freely in the present. However, it can be easily seen how healing processes also occur widely in settings which are not psychotherapy.

Descriptions: All roles have a transformational and educational goal: Training - teaching – training – mentoring – coaching – supervising – counselling – consulting – psychotherapy.

- TA Training: the longer-term process of learning how to use TA in professional practice and the life of the trainees. Potentially leading to qualification as a Certified Transactional Analyst.
- Teaching – Usually in short time periods, the teacher presenting and delivering information that is prepared by the teacher.
- Mentoring / supervision / coaching / consultancy / counselling - these terms are often used interchangeably to describe similar processes. Usually within the culture and system in which the work is taking place there is usually a preferred term. For example, in hospitals experienced nurses are often used to mentor colleagues, within the world of TA we usually refer to the process of supervision and in businesses the term coaching or consulting is used.

All of these terms are used to describe the process in which a “sponsor”, who is experienced, and possibly qualified as a supervisor / mentor / coach / consultant / counselling practitioner in the relevant field, are guiding the learner in their professional development, enabling autonomous and professional functioning in the here and now. The supervisor may well introduce new theory or ideas to the supervisee and during these periods may take on the role of a teacher. Personal issues which are raised may also be dealt with in what is in effect a psychotherapeutic process.

- The psychotherapy process is focussed on the individual’s development in their relationship with themselves, others, and the world around them. During the psychotherapy process it may well be that the psychotherapist teaches the clients new information or explores issues in the client’s professional lives, and during these periods the process may look similar to coaching or teaching.

Learning - TA theory and practice:

TA training always starts with the TA 101 course which describes the core philosophy, approaches, and models of TA. All of these models are useful when considering how to offer teaching, training, and supervision. For example, considering how individual script narratives may inhibit or enhance learning for example.



Ego states are also commonly used to analyse the training experience.

Using a very simplified model of ego states, TA training needs to be Adult centred while also being attractive to Parent values and Child desires.

Learning is about change and desire provides the motivation to move from the current state to a desired state.



TA training normally takes place within groups and therefore all that we understand about the formation, and development of groups can be applied to the training (learning) group.

For example, the importance of safety and relational needs, the importance of structure, recognition, and stimulation.



- "OKness" – we all of worth, and value. TA's goal is to promote relationships which reflect and OK-OK attitude.

- In his chapter in the Educational TA book, Pete Shotton reminds us of the original frame that Virginia Satir used in her work. While these terms lack the simplicity of the OK – OK statement, it seems to me that they catch the importance and meaning in a more realistic way.
 - I count.
 - You count.
 - Context counts.
 - We count. (My addition)
- Basic needs... safety, warmth, comfort, food, and drink if any of these are not attended to, they will take priority over learning new material.
- Berne and other TA trainers have emphasised the need for joy and pleasure in groups. Humour is important and any who know me will be aware that I also believe any training experience should be fun.
- Berne describes 3 hungers, which must be met in the training group, with a free exchange of strokes in the group.
 - Stimulation – the need to experience being alive.
 - Recognition – the need to be significant to others and for that to be acknowledged.
 - Structure – the need to know how we and others are expected to be at any given time.
- TA's frame of reference is that each person has responsibility, for their thinking, their feelings, and their actions. Therefore, each person can grow, learn, and change.
- TA practitioners believe in “open communication”, with the goal of promoting within relationship, autonomy, intimacy, and spontaneity.
- These philosophical ideas lead consequentially to TA being a contractual methodology. The contract defines the professional relationship, the outcomes, and the process of the training.
- The trainee and the trainer are both open to learning in a mutual relationship.
- The trainer aims to create a safe, comfortable environment that creates secure trainer – trainee – trainee relationships in which co-created, and transformative learning experiences develop.
- The trainer models how and what it means to be a Transactional Analyst in all they do and say within the group. This itself is a significant transformative learning experience.
- One aspect of the modelling from the trainer that is central is how he/she effectively navigates in and through group processes while attending to completing the task.
- Within the training group the trainer reflects with the group on the processes in the group in order to make sense theoretically of the processes and over time the group members reflect on their learning regarding theory and practice.

Using TA models, we can understand how and the context in which learning takes place:



From conception onwards, we learn.

Most learning happens at a somatic bodily level. An infant is learning how to talk, walk, jump, run, fall, and get up again. When provided with a safe and nurturing environment infants learn how amazing they, others and life can be.

In their curiosity they reach out and grasp, crawl, and run in a passionate desire toward whatever their goal is. They also learn to live through disappointments and frustrations to creatively live and learn. There are various models of TA which describe this developmental process, such as protocol, and script narratives.

All trainers and group leaders need to reflect on how they can create safe and nurturing conditions within their groups, inviting participants to be creative, passionate and curious in following their desires.

However, many children do not experience those safe conditions either at home or in schools, where they experience life limiting attributions, injunctions and demanding powerful others. Learning experiences can become tedious and shameful. We have several TA models that provide a framework for understanding these life limiting experiences and the dysfunctional life decisions which may well have saved the child when they were made however now can cause many problems in living and in learning.

I personally start reflecting on the blocks to learning and growth using impasse theory which was first described by the Goulding's. Impasses are understood in the context of the life script system, which integrates the original script matrix from Steiner and the racket system developed by Erskine and Zalcman. I understand a person's life script as a narrative which provides us with a way of understanding ourselves in our experience of others and the world around us. Other core TA models such as ego states and the passivity material also provide valuable tools for understanding these processes.

Real life examples:

In both examples that follow it is important to recognise that both trainees were also in psychotherapy, and the stories presented here necessarily are abridged versions of their stories.



One trainee was severely mocked by his family for not being able to read the time on a kitchen clock, despite never having been told how to.

As a trainer I would explain an apparently simple model to this trainee, and he was simply unable to comprehend how it might be applied to the client.

This led to a long struggle with shame for the trainee who relived his script story that he was foolish while being afraid to admit his stuck-ness for fear of being mocked. As a trainer I was wondering what I was doing wrong, how come I could not explain the idea well enough.

It was a great relief to the trainee, the trainer and the whole group when following an exercise in the group the connection was made by the trainee between the forgotten but unforgettable early experience of being mocked for not being able to read the clock and the current struggle to understand and importantly to express verbally TA constructs. We laughed together as we realised that it became much easier for the trainee if I re-framed the model as extremely complex, which only a few people could possibly understand, and for sure his family would not understand. In this way the trainee delightfully found that he could access his anger and move out of his shame position, and he began to enjoy showing off about what he knew and could do with TA theory.

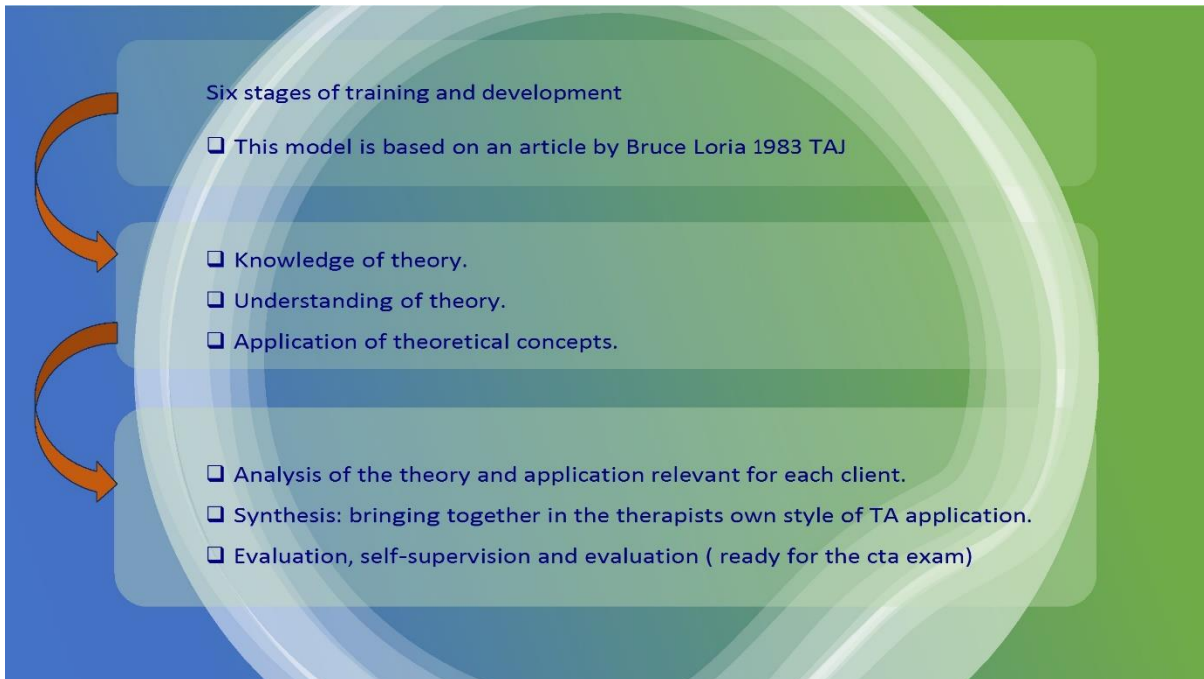
Another trainee was repeatedly told he was stupid because as a young boy he could not repeatedly failed the regular Monday morning spelling test for which he had practiced on Sunday evening with his mother. He discovered late in life, following a supervision session that he was in fact dyslexic and contrary to the attributions he received at school was in fact extremely intelligent.

The supervisor was the first person to inform him that contrary to his script belief he was in fact very intelligent. The supervisor confirmed how he appreciated the speed at which the trainee understood complex processes. He could analyse and understand complex client stories and use TA theories to make meaning of their psychotherapeutic process. This transformational confrontation was followed by further discoveries that transformed the trainee's professional life. He is now a successful and experienced TA trainer.

TA training – a developmental journey:

The following 6 stages of training are central to my understanding of the developmental process of TA training and professional development, both at CTA and TSTA level.

TAJ July 1983 - Beyond Training – The education of Transactional Analysts. In this article Bruce R Loria describes and develops the 6 stages of training which were first described almost 100 years ago in “Blooms taxonomy of Education”.



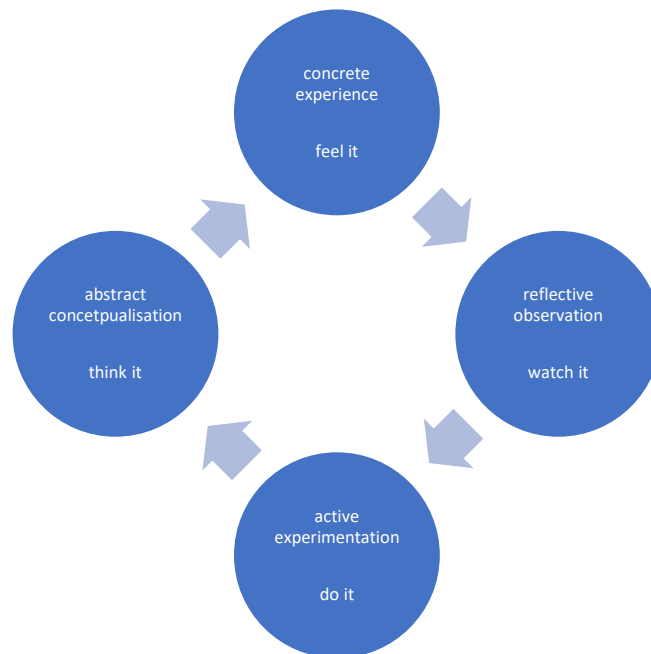
M. Knowles in "The Adult Learner." Presents 4 phases of learning:

1. **Need:** Determination of the need in order to achieve the learners desired state / goal.
2. **Create:** Create a strategy and resources in order to achieve the learning goal.
3. **Implement:** Implementing the learning strategy and use of the learning resources.
4. **Evaluate:** Assessment of attainment, has the desired state been achieved?

Learning Styles

The trainer will take account of the different learning styles represented in the training group noting various models:

Kolb's model – perhaps the most frequently used / well known model of learning describes a cycle with four types of learning experience: Experience > Reflect > Conceptualise > Experiment.



Rhae Hooper, an Australian TA trainer describes in her chapter in the Educational TA book Kolb's learning cycle. She then refers to research on leadership qualities required for educators:

- 1) Warmth – effective leaders referred to others positively, they tended to trust and like others establishing warm relationships.
- 2) Indirectness – facilitating people as they learn for themselves rather than sharing everything they know too quickly. Even when it would be “good for people to know.”
- 3) Cognitive organisation – keeping clear objectives in mind, dividing the learning into manageable chunks and orderly steps. While providing clear answers to questions, owning what they know and don't know.
- 4) Enthusiasm, both for the relationships with the trainees and also for the material being taught.

David Kolb: stated that learning is the process in which knowledge is created through the transformation of experience. He described 4 learning styles which he presented in the experiential learning cycle.

Kolb: Experience > Reflect > Conceptualise > Experiment.

People learn in different ways; for example, the theoretical explanation prior to learning to ski, swim, cycle provides little help outside of the obvious. First figure out how to stop when skiing before going to the top of the mountain! Don't breathe under the water and start in the shallow end. When you get on the bike figure out where the breaks are and how to use them.

When teaching my young 4-year-old daughter to ride a bike I honestly gave her clear instructions on how to use the break, accompanied by a stern instruction, not to put her foot on the ground when moving. Neither instruction helped with predictable outcomes, however the lessons were learned the hard way. Interestingly a few years later we went through a similar experienced when she went onto the ski slope, learning to stop really is very important.

When training you need to offer learning opportunities for each style:

- **Concrete Experience** – let's feel it – ambiguity is enjoyed, feeling based and person orientated.
- **Reflective observation** – let's watch it – ideas based - passive – watching others before trying.
- **Active experimentation** – let's do it – little interest in theory – actively wants to test it.
- **Abstract conceptualisation** – let's think – analytical approach to theory and research, wants proof.

Education Imagos – Trudi Newton and Giles Barrow

	SCHOOLING			TRANSFORMATIONAL		
	Knowledge ----- focus is on ----- Person					
	Dogmatic	Technological	Liberal	Progressive	Humanistic	Radical
Contract	reward	assessment	information	support	nurture	mutuality
Leader	guru	instructor	teacher	guide	enabler	animator
Learner	in need	malleable	empty	committed	growing	equal
Strokes	obedience	competence	thinking	vision	development	empowerment
Discount	person	flexibility	experience	own needs	community	information
Imago						

Trudi Newton and Giles Barrow – Education Imagos

In the introduction to section 4 of their book Educational TA Trudi Newton introduces a complex continuum in a grid showing the different philosophical models of education. Each educational philosophy has its own educational contract and consequently different approaches to learning. Newton presents 6 education philosophies in a table which she labels as “Learning Imagos”. The model has become very popular with those preparing for the TEW and the TSTA examination, I have worked with several candidates who described using the model to inform their work as TA trainers. My fellow TSTA examiners have also asked questions regarding this model.

Schooling:

- 1) **Dogmatic** – in which the group imago is dominated by the leader who acts as a guru imparting knowledge and demanding obedience from a “needy” learner who is rewarded for demonstrating their learning. There is no room for the individuality of the learner.
- 2) **Technological** – a traditional apprentice – master approach to imparting skills and knowledge. The learner complies with the master who assesses the learning and rewards skills learned as expected. There is no room for flexibility.
- 3) **Liberal** – this approach is how teaching in TA training groups is typically taught with trainer as an expert sharing their knowledge and experience. The learner is perceived as an empty vessel to be filled with knowledge from the trainer. The learners thinking is rewarded, however there is no room for the learner’s previous knowledge and experience.

Transformational:

- 4) **Progressive** – The trainer is a guide and facilitator. The learner utilises their previous knowledge and experience as the foundation for learning. However, there is a risk that the individual learning needs can be discounted.
- 5) **Humanistic** - the trainer nurtures and enables each trainee’s holistic growth. The training is individuated and focussed on the trainee’s growth and development.
- 6) **Radical** - is framed as a community and politically focussed. In this philosophy the differentiation between teacher – learner is removed. The trainer - trainee distinction is removed with the goal of the group learning from each other. Discovering critically and creatively together how to transform their world. In this approach there is a contract for mutuality, and empowerment is rewarded. However, there is a risk that there is a lack of new information, for example information regarding ethical and examination requirements.

My reflections on this model: I have several reservations and criticisms regarding the model which in my view is contains contradictions and does not reflect our experiences of TA training. It is too rigid

and simplistic in the descriptions of the various approaches and in my view uses language in a confusing way which is at times seems contrary to TA's core philosophy. For example, describing learners as empty vessels clearly is contrary to TA's philosophy. I don't think any TA trainer would describe a member of their TA group as an empty vessel! In Newton's grid there is a row showing the group imago for each approach. I may have missed the explanation, but I do not understand how the fixed imagos in the grid relate to Berne's original ideas regarding group imagos which develop and change over time.

Reflecting, at this point on how we differentiate between teaching and training seems important. Within the TA training context, I would understand most of the model's approaches which can be used within long-term training processes, rather than a discreet teaching piece. I would expect that within most, if not all TA training groups four of the teaching philosophies will be used frequently as the trainer responds flexibly to the group's contract, needs and experience.

However, I would not expect a TA trainer to set themselves up as a Guru while praising obedience. I also do not consider the radical approach to be workable with in a TA training group. By definition TA training hours are only counted when the presenter has a recognised qualification, a PTSTA or TSTA. Therefore, within all TA training groups the distinction in roles and responsibilities between trainer and trainee is maintained. There are many ways to recognise mutuality, and to co-create positive and humanistic learning experiences in the training group without losing the distinction between trainer and trainee. While saying this I am not excluding the possibility of TA trainers being involved in development groups that use this approach, and these groups can be very valuable for those involved. However, I do not see how groups using this approach could be counted as a TA training group. They also remind me of the groups developed by Bion at the Tavistock which were created to observe group dynamics, although even with those groups the leader was always defined as the leader.

The format of the TEW and TTA examination invites candidates to demonstrate their teaching approach in a 20-minute slot or less. In my experience all these demonstrations would usually be described as using the "liberal" approach, however that it is too simplistic as the candidates also incorporate aspects which could be considered technological, humanistic, or progressive as well.

The CTA, TEW and TSTA examinations are assessments by experienced / knowledgeable TA practitioners. According to the grid this is using the technological approach to training – which in many ways does reflect the overall TA training process which has been described as an apprenticeship. In recent years there have been discussions regarding changing the examination system to one of in-house assessments by the training schools, which also reflect a technological approach, but in my runs a greater risk of trainers being perceived as acting as gurus with the power to accredit or refuse accreditation.

Although not explicitly stated this approach is reflected in the 1982 TAJ article by Erskine: Supervision of Psychotherapy – Models for Professional Development. Interesting this excellent article clearly illustrates the different uses of terms such as supervision, training, development, therapy for trainees. It is an article about supervision and yet talks at length about the training developmental stages of trainees.

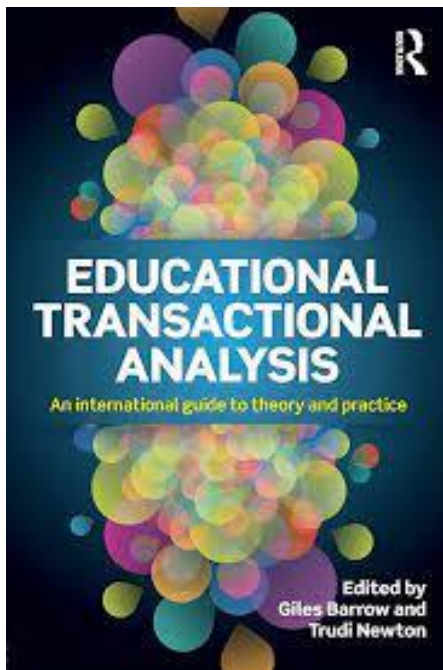
Outside of TA there are authors who describe their approach to psychotherapy training explicitly as an apprenticeship: see online: - Apprenticeship Model of Psychotherapy Training and Supervision: *“Apprenticeship experiences have existed for centuries as ways to gradually introduce individuals to professional trades, skills, and roles. Cobblers, blacksmiths, attorneys, artists, healers, and surgeons have all learned as apprentices. Traditional apprenticeships focus on specific methods for carrying out physical skills instrumental to accomplishing meaningful practical tasks. Apprenticeship learning occurs through a combination of observing, coaching, and practice”*.

“Schooling – Transformation”: This continuum creates a false dichotomy in my view. An apprenticeship which uses a “technical” approach is often transformational for those involved, and I ask what is the difference between being an instructor and being a guide? For example, my ski and mountaineering trainers were experts in their respective fields. They were inspirational instructors and guides who I trusted with my life. Although neither of them would have named or described what they did using TA language. They created a safe and relational learning space for my personalised learning within a group setting. My learning was indeed extremely transformative. While I will never be an expert on the mountains before the training I could not ski. Nor could I go places where I would need crampons and an ice axe. After the respective trainings I could ski enthusiastically and adventure into high snowy mountains where I had to make use of crampons and an ice axe, which on one occasion I used to save my life in a fall.

Having made all those criticisms I believe the grid does introduce trainers to different available styles all of which can be made use of in the service of creating transformative and relational training experiences!

TA Books and TAJ articles:

- **Beyond Training – The education of Transactional Analysts.** – TAJ July 1983 Bruce R Loria. – The 6 stages of training are described.
- **Supervision of Psychotherapy – Models for Professional Development:** 1982 TAJ article by Erskine. The developmental stages of training are discussed at length.



Educational Transactional Analysis – edited by Giles Barrow and Trudi Newton. A collection of reflections by those within the of education –

“Educational TA provides a psychological framework for explaining what happens in learning”.

Clearly this is applicable to the education of TA practitioners and therefore this book provides a foundation for TA trainers within all the fields to explore and think about their own approach to training.

Tactics: Transactional Analysis Concepts for All Trainers, Teachers, and Tutors and Insight into Collaborative Learning Strategies - This is a great resource book for all TA trainers.