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10 THE TRAINING ENDORSEMENT WORKSHOP (TEW)

PREFACE

Nature and purposes of the training endorsement workshop

The training endorsement workshop (TEW) is an educational, evaluative and prescriptive process designed to prepare and evaluate certified transactional analysts as TA supervisors and teachers. More importantly it is the gateway into a professional and personal development journey that typically involves individuals moving into a new professional identity. By applying for the TEW, participants are in preparation as adult educators and principal supervisors, each of which have significant implications. Within the context of our philosophy and values, the aim of this adult education and supervision is to advocate social justice, cultural diversity and ecological awareness. To embark on the journey is to accept the challenge of ensuring that TA remains potent, relevant and useful in terms of addressing diversity, sustainability and justice.

Role of TSTA

The decision to progress into the provisional role of Teaching and Supervising Transactional Analyst is a step into the responsible leadership region of the TA community. P/TSTA status confers a degree of privilege and entitlement for the individual, and it is central to the integrity of TA that this is both acknowledged and held with this entitlement in mind by the individual trainer. In this revision of the handbook we have begun to reduce the level of detailed requirements in order to encourage trainers, supervisors and especially principal supervisors/sponsors to exercise their own discernment in supporting practitioners toward accreditation.

Whilst the rank of P/TSTA indicates a high level of experience in the tasks of supervision and teaching, more significantly the trainer undertakes a responsibility on behalf of the TA professional community. In this current revision we are making explicit that the role of TSTA holds a particular status in the professional community that confers advantages to the individual including the opportunity to earn income on the basis of the additional qualification, examine and supervise at all levels, hold sponsoring contracts and, currently, enjoy these privileges in perpetuity. There is also a responsibility which includes cultivating a pluralist outlook, by which we mean acknowledging the inter-connectedness of diverse groups within the complexity of our international community. Consequently, the TEW is also an opportunity to begin a journey into understanding how anti-oppression, ecological sustainability and inclusion are integral to working effectively as a teaching and supervising transactional analyst.

10.1 Nature and purposes of the training endorsement workshop

The training endorsement workshop (TEW) is an educational, evaluative and prescriptive process designed to prepare and evaluate certified transactional analysts as TA supervisors and teachers. It is conducted by a staff of teaching and supervising transactional analysts (TSTAs). The TEW is not an examination but evaluative learning with feedback. It is a structure that allows IBOC to assess the teaching and supervision skills of CTAs and to ensure that the training being offered to the public will, from the outset, be at a level consistent with IBOC standards and ethics. For the participant, it is an opportunity to decide whether or not they want to make the commitment required to engage in the process of being trained and supervised in order to become a teaching and/or supervising transactional analyst.

TEW candidates will receive their endorsement formally in writing (not at the TEW). This may include possible requirements that the candidate must fulfill prior to signing a TSTA contract.

To qualify as a training endorsement workshop, the workshop must be arranged through and approved by IBOC, be staffed by TSTAs, and follow the format outlined in the description below.

10.2 Participants

Participants are interested in qualifying as TA trainers and supervisors and offering accredited TA training and supervision. In addition, they:

1. have passed the COC or IBOC certified transactional analyst (CTA) examination in the field of application in which they wish to initiate training; and
2. have been a certified transactional analyst for at least one year in that field of application.

10.3 Registration for the TEW

- Applications must be submitted no less than **8 months** before the TEW. (Form 12.10.1)
- They should be made to the IBOC Office.
- Withdrawal more than **six months** in advance of the TEW date, means the registration fee can be transferred to another IBOC TEW.
- When the withdrawal is between **six to two months** before the TEW, a transfer of the fee can take place only under extraordinary circumstances. Requests should be made to IBOC. Under these circumstances, IBOC will charge 10% of the fee for administrative costs.
- If a participant withdraws **less than two months** before the TEW, there is no refund.

10.4 TSTA supervision and letters of endorsement

The prospective PTSTA must get 'live' supervision from at least two TSTAs on their teaching and supervision within a year of the date of the TEW. Live supervision can be done face to face or via an online platform. It needs to be in real time to afford moments of feedback during the sessions, providing a developmental experience. This supervision needs to be in real time to afford feedback in the moment. If, in the judgment of these TSTAs, the supervisee is ready to become a PTSTA, each TSTA will complete an Endorsement letter for TEW (Form 12.10.2) that the prospective PTSTA must include in the documentation for the TEW.

10.5 Materials for the TEW

10.5.1 Training Proposal Outline

All participants must submit via email:

- their training proposal outline (TPO) (see Section 10.12), **six months** before the TEW to the IBOC Office together with an endorsement letter for the TPO (Form 12.10.2) from a TSTA.
- the endorsement letters from TSTAs (two letters for teaching and two for supervision) **latest 4 weeks before the TEW** (Form 12.10.2).

The TPO will be read by a staff member (TSTA). If this TSTA has questions about your TPO or is not satisfied with your TPO they might get in contact with you to seek answers to additional questions and negotiate with you about delivering some more writings before the TEW. The feedback will be given to the participants before and during the TEW.
The obtained endorsement of the TPO is valid for a period of three years.

10.5.2. Participants should prepare and take the following to an <u>onsite</u> TEW

1. Four copies of their TPO, one signed on the first page by the TSTA who endorsed it.
2. Four copies of an outline of a schedule of what they are teaching in a TA module. It is based on TA theory of the participants' own or other authors' material which would be suitable for a beginning or advanced TA training group. The schedule will describe the flow of a half day / day training.
3. Each candidate will select a section from the above named schedule and use this to demonstrate their teaching style. The candidate will have a maximum of 20 minutes to engage the group in learning through a process that is congruent with the candidate's approach as an adult educator. Staff will provide feedback on the effectiveness of the candidate's teaching style.
4. Four copies of a handout relating to the content of the teaching piece which is given to the audience as didactic support.
5. A question or problem for supervision. Participants should be prepared to supervise a fellow-participant and be supervised by a fellow-participant.
6. A log consisting of:
   - concise, current professional curriculum vitae
   - endorsements from two TSTAs for teaching (Form 12.10.2).
   - endorsements from two TSTAs for supervision (Form 12.10.2).
   - an endorsement letter for the TPO from a TSTA (Form 12.10.2)
   - their CTA certificate
   - the copy of the bank transfer or payment for the TEW fee

10.5.3 Participants should prepare the following for an <u>online TEW</u>

1. A copy of an outline of a schedule of what they are teaching in a TA module. It is based on TA theory of the participants' own or other authors' material which would be suitable for a beginning or advanced TA training group. The schedule will describe the flow of a half day / day training.
2. Each candidate will select a section from the above named schedule and use this to demonstrate their teaching style. The candidate will have a maximum of 20 minutes to engage the group in learning through a process that is congruent with the candidate's approach as an adult educator. Staff will provide feedback on the effectiveness of the candidate's teaching style.
3. A copy of a handout relating to the content of the teaching piece which can be shared online with the audience as didactic support.
4. A question or problem for supervision. Participants should be prepared to supervise a fellow-participant and be supervised by a fellow-participant.

Participants should submit the following **PDF files** at least **4 full weeks** before the start of the TEW:

1. Teaching materials as listed in Points 1-3 above.
2. A log consisting of:
   - a concise, current professional curriculum vitae
   - endorsements from two TSTAs for teaching (Form 12.10.2).
   - endorsements from two TSTAs for supervision (Form 12.10.2).
   - an endorsement letter for the TPO from a TSTA (Form 12.10.2) Note that this will have been uploaded with the TPO **six months** before the TEW
   - their CTA certificate
   - the copy of the bank transfer or payment confirmation for the TEW fee

10.6 Organization of a TEW

1. There will not be more than twenty participants in a TEW. That assumes a staff of six TSTAs, including the TEW supervisor, is available. If fewer staff are available, the maximum number of participants may be set at less than 20, at the discretion of the TEW coordinator.
2. IBOC will organize TEWs in response to demand and usually requires a minimum of five participants. TEWs will normally be linked to a conference or trainers' meeting.
3. IBOC will also organize online TEWs
4. TEWs normally last for three days. However, if there are fewer than eight participants, the TEW coordinator and the TEW supervisor can decide to run the TEW over two days.
5. The date of the TEW must be publicized at least twelve months in advance, and will be advertised in *The Script,* the *EATA Newsletter*, and their websites.
6. The TEW will be conducted in English. IBOC does not provide translators and does not pay translators' expenses. Participants who need translation must provide their own translators. To allow work in small groups, a guideline is that not more than four participants should share a translator. For online TEWs please check with the TEW coordinator about translation arrangements.

10.7 Staffing of a TEW

1. Staffing of a TEW is on a volunteer basis, and TSTAs give their time and expertise as a service to future PTSTAs and for the advancement of the organization and dissemination of TA.
2. TEW staff will be reimbursed for their lodging and living expenses.
3. The IBOC Office is responsible for the administrative work in organizing the TEW.
4. During the TEW, a TEW supervisor will serve primarily as a process person with the staff and participants. It is the TEW supervisor's job to explain the meaning and purpose of the TEW to the staff and the participants and to ensure that this is carried through in the evaluation process with each participant.
   Make sure that all new staff members are integrated in the process of the TEW and receive all necessary feedback.

10.8 The TEW program

The TEW is conducted in large and small groups with the staff facilitating active discussion and feedback among workshop participants. The workshop itself is divided into five sections, described in outline form below:

- Orientation
- Teaching
- Supervision
- Training proposals
- Individual interviews

In the first four sections, the TEW staff give presentations and initiate discussion in the large group or in small groups relating to:

- policies and procedures
- teaching methods
- supervision methods
- training program designs
- examination standards, and
- ethics and professional standards.

The presentations and discussions are interspersed with small-group sessions in which participants will use prepared material to demonstrate their competence and be evaluated on their teaching, supervision, and training proposals. Throughout the process, peer and staff review is used to give feedback to participants on both their strengths and areas for further learning in a supportive and co-operative atmosphere.

10.9 Feedback, requirements and recommendations from TEW staff

The goal of the TEW is to provide participants with feedback about their strengths and weaknesses as supervisors and teachers, and thus individual interviews are a key element in the process. Each participant should receive extensive feedback on areas in which they need to develop skills. There will be requirements and recommendations, which will form the basis of the contract and training program that the participant creates with the principal supervisor with whom they sign the TSTA contract.

As stated above, the TEW is not an examination, and there will therefore be no deferrals. However, the TEW staff may consider there are significant shortcomings in the work of a prospective PTSTA. The staff will make written requirements and recommendations (Form 12.10.3) that the prospective PTSTA and their principal supervisor need to complete so that the participant can grow and learn in the areas specified.

- If the candidate is **endorsed** they may take out a PTSTA contract. The contract has to be signed within one year after the TEW, otherwise the candidate has to follow a new TEW.
- If there are **requirements**, they will be listed on Form 12.10.3. and are expected to be met within 6 months. A TSTA in the same field is required to write a report stating what has been done in order to fulfill the requirements. This report is sent to the TEW staff lead and copied to IBOC office. The TEW staff lead then affirms that the candidate is now ready to be endorsed.

- The IBOC Office will issue an endorsement and the candidate is now able to take out a PTSTA contract.

- **10.10 The TSTA contract**

The TEW is a workshop for evaluation and feedback and is a preliminary requirement to be satisfied before initiating procedures to sign the TSTA contract. In order to work and train as a PTSTA, a person must sign a TSTA contract and have it endorsed by IBOC. The contract must be signed within one year otherwise the candidate has to participate in a new TEW. The candidate cannot practice or advertise as a PTSTA until the date of endorsement of the contract. TSTA contracts last for seven years and may be renewed once (see Section 6.4). It is not necessary to complete another TEW before contract renewal. When the term of the contract expires, the title of PTSTA can no longer be used.

10.11 Content outline for the TEW

1. Orientation

a. Introductions
b. Orientation (staff presentations)
    i. The trainer and the TA organizations
    ii. IBOC policies and procedures
    iii. IBOC guidelines and examinations
c. Organization
    i. Scheduling
    ii. Staff and group assignments

2. Teaching

a. Teaching methods (staff presentation)
b. Teaching presentations (participants in small groups)
    i. Review of teaching segment outlines
    ii. Individual teaching demonstrations
    iii. Feedback to candidates

3. Supervision

a. Supervision methods (staff presentation)
b. Supervision (participants in small groups)
    i. Supervision of other participants
    ii. Feedback to candidates

4. Training proposals

a. Training program designs (staff presentation)
b. Ethics and professional standards: how to teach and evaluate them (staff presentation)
c. Review of training proposal outlines (small-group discussion and feedback)

5. Individual interviews

These are discussions with individual participants to look at evaluations, requirements and recommendations for further training and supervision. This is the point when TEW staff will inform the participant of any requirements that the prospective PTSTA and principal supervisor will have to complete before the TSTA contract can be signed.

10.12 The training proposal outline (TPO)

The TPO questions below are intended to help the participant prepare for the training endorsement workshop and will be used for group discussion and feedback from the staff. They are suggestions for what you might include. The TPO will be marked as a whole and not on whether you do or do not include each suggestion.

- Please type your answers to the questions.
- Put your name in the upper right-hand corner of each page.
- Your TPO should not be more than 20 pages in length, including any diagrams and your bibliography.
- It should be typed, double-spaced and printed on one side of the paper only.
- If you are planning to be endorsed for teaching only, you need not answer the questions about supervision, though you may if you wish.
- If you are planning to be endorsed for supervision only, please answer the questions about teaching in terms of your ideas about what should be included, even though you may not plan to provide the teaching yourself.
- If English is not your first language, check with the TEW supervisor to see if there will be a staff member speaking your language at this TEW and if you can write the TPO in that language. If you do this, you must add a summary in English.
- If you need a translator, you must take responsibility for organizing this yourself.
- Before the TPO is submitted it should be read and endorsed by one TSTA. This is in addition to the two TSTA endorsements for teaching and two for supervision
- Send a copy in electronic form to the person or persons indicated by the IBOC Office **at least six months before the TEW**.

The TPO questions

A. Personal factors
- What is your motivation in becoming a PTSTA? Say something about your professional life, psychological motivation, the economic implications and your enthusiasm for TA.
- How does being a PTSTA fit into your mid and long-range professional life planning?
- What are your plans for the next five or ten years?

B Professional factors
- Write about your own experience of being a trainee. Say something about its length, intensity, the range of TA taught, its integration with other theories, supervision, self-experience, personal growth, the personal style of your trainer(s), ethical issues, cultural diversity, attachment, and separation. How will this experience influence your own outline for a curriculum?
- Describe your theoretical understanding of the teaching and learning process and say how you would apply this to the aims, contents and methodology of your own training program. Include some reference to adult learning and curriculum theory.
- Reflect on own exam experience as a candidate or as an examiner.

C Curriculum and teaching
- In what context will you start training? Include your thinking about your cultural and social context and the role of TA training within this.

- Will you train alone or in co-operation with others? If in co-operation, say with whom and make clear what your particular contribution will be. Who will participate in your training program?
- How will you select participants and what will your selection procedures be?
- What will your criteria be for taking a trainee into contractual training?
- Provide an overview of the curriculum and subjects you think should be taught in a complete training program, leading to trainees becoming transactional analysts.
- Give a detailed time structure for the whole curriculum program, including the organization of the training days, seminars, special workshops, therapy marathons, and supervision units, etc.
- Describe the methods you will use for teaching TA, including comments on your general and specific theory and practice. Say how you will lead experiential learning and encourage personal growth.
- How will you evaluate the level of your trainees at different stages of training?
- Include your ideas on basic competence, entering the examination group, and preparation for examination.
- How will you make sure that your methods fit the educational level of your trainees and how will you take into account the training levels of your trainees?

D Exams

- Describe your ideas about evaluation and about guiding your candidates through to the exam. Give examples of your good examination experience and describe what you would change in the exam process and what you could do to prepare yourself for being a good examiner.

E Supervision

- Describe your theoretical understanding of and method of doing supervision.

F Therapy

- Describe your ideas about the role of personal therapy within the training program. You might include comments on criteria and requirements for personal growth, the advantages and disadvantages of multiple professional relationships, and possible ethical problems arising from the above.

G Research

- Outline your ideas about the relationship between research and TA theory and practice.
- What TA research has had most significance for you, and how will you integrate research into your training program?

H Fields of TA practice

- How will you ensure that the four separate fields of TA practice are accounted for in your training and teaching?

10.13 Documentation

Application for the TEW (12.10.1)
Endorsement letter for TEW (12.10.2)
TEW Staff Evaluation Form (12.10.3)

TEW Self-evaluation Form (12.10.4)
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TSTA Contract (12.6.2)