

**PANEL DISCUSSION**  
**The power of referral and diversity in approach**

Once upon a time you receive a phone call:

**Hello, may I speak with** (gives your name)

(you confirm your name)

**- my name's Robin Smith, and I was given your name by Chris Jones** (you note to yourself that this name is unfamiliar to you) **- I'm the director and owner of a successful small business....there's about 200 staff and we started 6 years ago....and what I'm finding is that I seem to have so little time still with my family, my work-life balance is not what it should be.....and this seems typical for most of my senior staff too.... And I want to make changes.....I wonder whether you can help?**

What are you thinking?

What do you say?

How do you imagine a first meeting? - what might you want to know?

What info might you give about the sorts of contract you could/would make?

How might you expect this relationship to develop?

**ONLY TURN OVER** when you have swapped some initial speculative thinking in your small group.....

What **gender** did you ascribe to Robin? And to Chris? Does gender make any difference?

By recommending calling you **Chris Jones** has - knowingly or not - made an **initial assessment** of Robin's issues, because Chris has recommended (i) a transactional analyst (ii) with a particular field of application: psychotherapy, counselling, education, or organisations.

Ethically, whichever field you practice in, you will need to make another **assessment** and refer on, if appropriate - ensuring Robin has sufficient info about the options for change. Does Robin require:

A **psychotherapist** who will focus on Robin's personality issues ?

A **counsellor** who might help Robin (and maybe family) problem solve?

An **educator** who can provide Robin with development opportunities personally and professionally about work life balance through training and/or coaching?

An **organisational consultant** who will investigate what in the structures and dynamics of the organisation is creating boundary issues for staff, including Robin?

**To what extent do you have sufficient info and understanding to do this?**

Below are the EATA handbook (section 5) descriptions of these TA fields:

**TA Counselling** is a professional activity within a contractual relationship. The counselling process enables clients or client systems to develop awareness, options and skills for problem management and personal development in daily life through the enhancement of their strengths, resources and functioning. Its aim is to increase autonomy in relation to their social, professional and cultural environment. (Some professionals) are: social welfare, healthcare, pastoral work, prevention, mediation, process facilitation, multicultural work and humanitarian activities.

*TA Education is for people who work in the area of learning and study in pre-school, school and university contexts. It is also concerned with the support of child, adolescent and adult learning within the family, the institution or society. The work may be applied to the development of teaching teams and institutions. The aim is to further personal and professional growth both scholastic and social.*

**TA Organisations** is for practitioners who work in or for organisations, taking into account organisational frames of reference and contexts as well as organisational development. The work is aimed at the development, growth and increased effectiveness of people working within organisations.....the client is the organisation itself, not an individual or team who happens to operate in an organisational context.....the link with the development of the organisation as a whole must be visible....to increase the autonomy of organisations - their effectiveness, durability and capacity for development.

*TA Psychotherapy field is for trainees who aim to facilitate the client's capacity for self-actualisation, healing and change. The psychotherapeutic process enables the client to recognise and change archaic and self-limiting patterns - 'to deal with the pain of the past in the present so that they are free to live their lives in the future'. The aim is for clients to understand themselves and their relationships and create options to live their lives in an aware, creative and spontaneous way.*