

## **President's note regarding the finalization of an organisational complaint process in the context of the publication of the revised handbook – September 2023**

In the context of the publication of the revised handbook 2022/23, Relevant, controversial, and at times very polarizing and emotional discussions have been conducted in diverse meetings with differing groups of colleagues.

As one consequence an organisational complaint was submitted to the EATA Ethics Advisor by five TSTAs from different countries.

The process of the organisational complaint is now closed and with this statement I (Sylvia Schachner, EATA President), on behalf of the Executive Committee, will present information about the process of organisational complaints in general. I then go on to provide a summary of the recommendations given in the report concerning this complaint.

The report itself will be made available in full by Robin Hobbes (EATA Ethics Advisor) on request. Please email: [ethics-advisor@eatanews.org](mailto:ethics-advisor@eatanews.org) requesting a copy if you so require.

### **Organisational Complaint process**

An organisational complaint is a valuable and important tool within our association that provides well-defined procedures and protocols to deal with situations where a disagreement regarding lived processes cannot be solved otherwise.

On one hand it is important for us to trust and assume that colleagues carrying certain roles within EATA fulfil their tasks with responsibility, care and follow the current agreed practices and processes. On the other hand, for a lively and up-to-date organization, it is also important to question processes and strategies where necessary and to adapt and change them if necessary. The organisational procedures and protocols require respect and transparency so that there isn't a blaming of people or practices. Our TA values provide the frame and the clear process of an organizational complaint provides the structure. Every member has the right to formulate and submit an organisational complaint to the Ethics Advisor.

The Process of an organizational complaint is as follows:

- The Ethics Advisor investigates the complaint and decides if he/ she accepts it in total, partly or refuses it.
- If there is a substantive disagreement on questions of fact then the Advisor will appoint an arbitrator to investigate the matter. Where there are no substantive disagreements then the Advisor will deal with the complaint.
- After accepting the complaint (in full or partly) either the Ethics Advisor or the Arbitrator collects relevant documentation and information and investigates the matter with all concerned parties.

- Following this investigation the Ethics Advisor or the Arbitrator draws conclusions and writes a report which may include recommendations for a solution and/or future adaptations of lived practises/processes.
- This report is made available to the Executive Committee (EC).
- EC decides whether to accept the report and how to follow the recommendations.
- The report is made available to all concerned parties.
- Following this process the organisational complaint is deemed closed and no further action is taken in regard to the complaint.

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For further information on this process please refer to the Ethics Advisor.

### **Some background information concerning the current Organisational Complaint**

PTSC's responsibility is to define standards to guarantee the quality of TA-Training and qualification that meet European requirements on one hand and are compatible/adaptable to national requirements. This is a challenging task because there are huge differences on national requirements for professional training throughout Europe. The work of PTSC is very responsible and requires wide knowledge on national differences. This is especially relevant in the field of psychotherapy, but also in the other fields, because of the increasing regulations and standards in counselling, organizational development, and educational area. Because of this it seems very important to me to trust the expertise and the work of members of PTSC.

COC is the committee that executes the standards and is responsible for all processes around exams. COC is the connecting point to the ones who will be qualified. This "customer-orientated" task is essential to stay in contact with trainees and examiners.

These two committees must work very closely together, and one cannot be without the other. It is understandable that in the highly complex nature of these different tasks there can be different interests. These differing interests have to be balanced with care and they can create tensions - tensions between the committees, and between members and committees. To prevent conflict, a high degree of transparency and information is necessary.

The report on the complaint shows that the collaboration between COC and PTSC was disturbed over the last few years, and that this had a direct influence on the effectiveness of the work of both committees.

As consequence of this fact, and to rebuild a working relationship, a task force has been installed in July 2022 and successfully closed in July 2023. The concrete outcome of this task force was presented during a Zoom

meeting in June 2023 and during the council meeting 2023 resulting in forms of restructuring that will result in further collaborative development resulting in the successful meeting of quality standards. This will serve the interests and needs of the members, and also (re)build trust and contact between the different groups.

### **Summary of the Organisational Complaint regarding the process of publication of the revised handbook**

The Organisational Complaint considered whether PTSC had or had not fulfilled its duty of care to consult with EATA members on the substantive changes made to training and examination contained within the revised Handbook and also whether PTSC has a good enough structure for the effective implementation of substantive changes made in the Handbook.

The Ethics Advisor compiled a report on the complaint which was sent to EC, to the previous and current Chair of PTSC and the complainants. The report and the recommendations have been accepted by EC.

In my role as EATA President, I will now provide an overview of the recommendations given in the report written by Robin Hobbes (EATA Ethics Advisor). As they are accepted by EC, they will be the base for further action.

The report itself will be made available in full by Robin Hobbes (EATA Ethics Advisor) on request. Please email: [ethics-advisor@eatanews.org](mailto:ethics-advisor@eatanews.org).

The report concludes that PTSC did consult the EATA membership in a number of ways throughout the time that the Handbook was being revised. This included issuing a “revised” Revised Handbook that corrected a number of errors, changed some of its substantive changes, and clearly indicated where all changes could be found. However, there were also confusions and mistakes within this process that caused significant problems for the training and supervising community.

Furthermore, the report concludes that PTSC needs to develop clearer and more robust structures concerning the implementation of changes made to training and examination.

The report makes three requirements on PTSC and three recommendations:

- 1. PTSC should be required to keep Minutes that indicate when substantive changes to Training, Supervision and Examination are made, and they need to evidence that such changes are the decision of the Committee.*

2. *PTSC and COC should be required to revisit the PTSC Update and develop clearer systems for communicating to the membership on developments in relation to training, supervision and examination. They should clearly indicate on the EATA website where these developments can be found.*
3. *PTSC should be required to develop clear and transparent protocols and structures through which the membership is consulted on substantive changes to the Handbook.*
4. *In addition, I would recommend that PTSC consider including trainees who have signed a sponsorship contract with EATA in the consultation process concerning Handbook changes.*
5. *I further recommend that PTSC should consider whether its voting structure, in which only Council members who are members of PTSC, have a voting right in relation to PTSC decisions, is fit for practice.*
6. *I would recommend that, in conjunction with the Communications Committee, an online system is devised in which there is always only one Handbook that exists as an online published entity that is amended from time to time.*

### **Next steps**

I now invite PTSC and COC to collaborate and work on the base of these requirements and recommendations and to develop necessary structures and procedures.

Also, it seems important to have regular exchange between EC, PTSC and COC about the implementation of the recommended processes, especially the steps of the consultation processes. We will have to define clear rules and clarify the areas and boundaries of responsibilities, decision making and ways of conflict solving and escalation if necessary.

I will propose to PTSC and COC Chairs and one representative of each of those groups to meet for a one-day strategy meeting. If possible this will be done in person to discuss the progress of this work and to agree on any necessary next steps.

Concluding, I want to thank all involved colleagues, officers and members for their engagement, their openness, their stimulating discussions, and their willingness to controversially debate these important questions that are of concern to all of us.

I see this as steps to equal relationships and to creating a culture that includes open discussion, diversity and differences under the common umbrella that is given by our Transactional Analysis principles.

Sincerely  
Sylvia Schachner  
EATA President