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ARTICLE



Taking Up a Role in a System: A Clearer Understanding of One's Role Facilitates Mutually Satisfying **Relationships**

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ABSTRACT

You can only take up a role in a system if you know what the system is for. The authors use the concept of taking up a role as it is studied in the thinking of psychodynamic systemic research about role taking. The way in which individuals take up their various roles in various contexts largely determines the quality of their relationships in organizations and elsewhere. The authors look for various entrances to understand how people take up roles and how people build and maintain relationships from those roles.

KEYWORDS

Relationship: transactional analysis; systems theory; contracts; group dynamics; role theory; boundaries: strokes: complexity; primary task

Anxiety for people working in organizations is not just rooted in their internal dialoque (Parent-Child ego states) or private preoccupations (script) but often reflects real threats to professional identity coming from the organizational context (Hirschhorn, 1988). Establishing and maintaining relationships in an organizational context is no easy task. Eric Berne explained in a 1966 broadcast special on his book Games People Play (Berne, 1964) (https://www.youtube.com/watch?v=eLQS0IxLYMg) why he did not choose to call his new theory and method "interactional analysis" but to call it "transactional analysis" (TA). In our words, his reasoning boiled down to this: Transactional relationships are built on the expectation of reciprocity. That is the essence of any relationship. No reciprocation, no relationship. It is precisely the network of all this reciprocity that often makes building and maintaining relationships complex. This complexity is often experienced as threatening. Especially if we experience others as "very different from what we might consider to be comprehensive and acceptable" (Cornell, 2024, p. 124), it is easy to become entangled in the network of mutual expectations that every person is part of. The concept of transaction originally stems from the world of banking. A transaction is an agreement between a buyer and a seller to exchange goods, services, or monetary items. Applied to the world of relationships, it shows that what we say and do in relationships can be seen as an investment that we expect to yield some profit.

In this article, we focus on how to keep relationships in organizational contexts manageable. We use the idea of "taking up a role" from psychodynamic systemic research about role taking. The way in which individuals take up their various roles in various contexts largely determines the quality of their relationships in those contexts. So we speak of a person-in-role. In this article, we gratefully use what the London Grubb Institute of Behavioral Studies taught us.

Some Personal History

We know each other from when we were teachers at two of the five Student Guidance/ School Counseling (LBSD) courses in the Netherlands in the 1980s and 1990s. These courses made extensive use of the ideas of transactional analysis. Studying TA created a close bond between the teachers in these teacher training courses, and many of them became important ambassadors of TA in The Netherlands and elsewhere in the world. The teaching staff of the five institutes were regularly invited to reflect together on their collaboration in further developing the curricula. At one of their annual conferences, organized by our late TA colleague Erika Stern, the teachers were introduced to the use of psychodynamic and systemic thinking. These concepts refer to the application and integration of three overlapping thinking and research frameworks. This concerns ideas from psychoanalysis, including Winnicott (1971) and Klein (1932); systems thinking, including Miller and Rice (1967); and the study of behavior in groups, including Bion (1961). These frameworks aim to better understand the behavior of and in organizations. Nowadays these concepts can be found under the umbrella of "systems psychodynamics." Building on all of this, Dooley (1997) defined complex adaptive systems (CAS) as a group of semiautonomous agents who interact in interdependent ways to produce system-wide patterns. Those patterns then influence behavior of the agents (i.e., individuals or entities authorized to act on behalf of the organization). We welcome the concept of semiautonomy and question whether pure autonomy is ever an option. People are always limited to some extent by, for example, emotions; stress; social influences; lack of information; world events; legal, financial, or institutional constraints; and more.

Although TA mainly emphasizes the individual uniqueness of humans by emphasizing autonomy, the approach known as systems psychodynamics focuses on individuals only insofar as they manifest (semiautonomous) something on behalf of the dynamics of the entire system (de Graaf, 2013). The teachers of the courses just mentioned learned in an experiential way more about the life of organizations and groups. From there on, they also started to teach school counselors in a more experiential way about the complex dynamics with which they were confronted when taking up their role in their school.

As a more personal choice, we invested in learning more and in depth about experiential learning. We attended conferences, courses, and workshops at the Tavistock Institute of Human Relations and the Grubb Institute of Behavioral Studies, both in London. We still find these practical theories useful for helping people develop and maintain their relationships.

TA and Group Relations

The combination of TA and systems psychodynamics turned out to be extremely fruitful. We integrated the systems psychodynamics theory and practice into our TA training programs and organized conferences and seminars in the tradition of group relations in which systems psychodynamics could be experienced in real time (de Graaf & Levy, 2016). In various programs about TA and leadership, using experiential techniques and attending group relations seminars became part of learning experiences to which students were exposed. This led, in addition, to seminars developed by Servaas van Beekum, who was also a teacher in the aforementioned school counseling courses, and Joost Levy. These resulted in several Transactional Analysis Journal articles written by Servaas van Beekum (2005, 2006, 2007). In 2015, van Beekum was granted the Eric Berne Memorial Award for his contributions on unconscious processes in psychotherapy, consulting, and supervision. He led his article "The Relational Consultant" (van Beekum, 2006) with these words: "The rise of relational transactional analysis in conjunction with a reconnection of transactional analysis with its psychoanalytic roots raises the question of the importance of these developments for organizational consultants in transactional analysis" (p. 318). As has been said before, the question is whether Eric Berne, in distancing himself from psychoanalysis, "threw the baby out with the bathwater."

We gratefully use the aforementioned combination, following the trail that Hirschhorn (1988) set out when he began to integrate psychoanalytic concepts into a social systems perspective. TA concepts deserve similar treatment. It is our experience that when we combine TA and psychodynamic systems thinking, we have an unsurpassed combination to help leaders, groups, and organizations excel. Healthy mutual relationships create trust. Trust creates a distraction-free environment, which also has a positive impact on people's overall emotional and mental well-being. Most people have a healthy need for connection with other people, and this is no different in the workplace. Emerging research suggests that the exchange of "strokes" aligns with neural processes, influencing emotional well-being (Steiner, 2003, 2009). This ultimately makes an organization more productive. Mutual relationships form the foundation of every organization or group. Many employees cite the quality of relationships at work as one of the top factors in determining the level of employee satisfaction that makes their job satisfying—or not (de Graaf & Levy, 2008).

Taking Up the Pupil Role

Because both of us began our careers as teachers, it is no coincidence that a special publication with an intriguing title attracted our attention. The publication, by John Bazalgette (1983), then a senior consultant at The Grubb Institute, was titled "Taking Up the Pupil Role: Learning to Manage Oneself in a Hostile Environment." It was one of the first confrontations with the extremely useful phenomenon of "taking up a role." All those involved with the school-going child (e.g., parents, teachers, school directors, caretakers, etc.) too easily assume that the school-going child automatically knows how to be a pupil. However, anyone who delves deeper into the complexity of systems such as schools quickly discovers that being a pupil is often quite a struggle. The TA book Games Students Play (And What to Do about Them) by Ken Ernst was published as early as 1972. In it you can read how the struggle of students, teachers, and management usually takes the form of what in TA is referred to as "games."

For example, adolescent students, already plagued by attacks of hormones, look for an accessible path in the forest of expectations where it is easy to get lost. Those who try the most are the ones who often go astray. In the school context, these students are too easily dismissed as "difficult." However, they are not difficult, but they are struggling with the role. Such students are the first to get lost in a network of relationships, which also includes a school. And this often results in feelings of anxiety, fear, sadness, powerlessness, and anger. A powerful aphorism tells succinctly what these students need: "Students don't care how much teachers know until they know how much they care."

It also is often an anxiety-inducing struggle for other (adult) parties involved in creating an attractive learning environment to take up their roles effectively in relation to young adult students. When parents, teachers, school directors, and other stakeholders do not have a clear idea of how to take up their role, it becomes more difficult for students to take up their role effectively.

We are now convinced that these processes of role taking that apply to schools apply to many other systems in the public and private sectors. We have learned that the better the highest persons in a hierarchy take up their roles, the better others within the system are able to find, make, and take up their roles. The question of how someone effectively takes up a role in an organization or group continues to preoccupy us. It matters because it is about the quality of relationships, and the quality increases as people become better at taking up their role in a system.

Entering and Maintaining Relationships

The two assumptions with which Bazalgette began his article contain two lessons that have stayed with us in further exploring the possibilities and difficulties that people experience when they take up a role in a system. First, it is important to keep in touch with and to relate your capacities and responsibilities to the context in which you find yourself and to learn to act in light of that relation. In short, you can only take up a role in a system if you know what the purpose of the system is. The second is that this activity of "managing oneself" is mainly about taking up a role in a structure by developing an organizing principle in your mind that helps to give meaning to acquired experiences in relation to what the system is for in such a way that it generates options for action. That is, role, in the first place, is a necessary idea in the mind. Taking up a role cannot be taught, but it can be learned. Taking up a role is always subject to revision of views and judgments about yourself and about the changing context. The same applies to entering into and maintaining relationships: It is a matter of exploring, creating, and constructing—an ongoing task. To perform well as an employee, it is important that you know exactly what is expected of you and what you can expect from others. There is no more powerful tool here than the TA concept of contracting (Berne, 1963). The very idea that relationships always function on the basis of a contract beautifully reflects the mutuality in relationships. Role awareness is a requirement in order for every employee to be able to do their job well and enjoy it.



A Regulating Principle

Before we delve deeper into the question of how finding, making, and taking up a role can be invaluable for entering into and maintaining relationships, we want to first discuss the concept of role. An essay by Bruce Reed (one of the founders of the Grubb Institute) and published in 2001 by the Grubb Institute is titled "An Exploration of Role." In it Reed wrote, "To take up a role implies being able to formulate or discover, however intuitively, a regulating principle inside oneself, which enables one, as a person, to manage what one does in relation to the requirements of the situation one is in" (p. 2).

Systems consist of people, and the role represents the contract between the person and the system. The relationship between people and systems is not a one-way street but a continuous feedback loop. While people influence the design and functioning of systems, these systems in turn influence individuals and the choices they make. In organizations and groups, history, traditions, and expectations influence behavior in a circular manner to form dominant patterns. For that reason, relationships are never easy, and a contract cannot be static. In the dynamics of discourse, there is always and everywhere a person in a role.

This way of thinking about role differs from common terms in which a role can be:

- A position in a hierarchy or organizational tree
- A job description, including a set of specific duties and responsibilities attached to a particular position or job to fulfill a task in the system
- A part someone plays, like an actor in a drama
- A skill to be learned by experience

Most definitions of role are prescriptive and rather static. They do not do justice to people's daily experience. They suggest that a role is completely or largely defined for us. Role, however, is not a part someone plays, as if it were not real. No one gets far in life by checking off to-do lists. No job description is going to help a manager when a group member explodes in anger in a team meeting. Team members do not bring their job description to team meetings to find out how to respond to (unexpected) incidents. Teams do not come with instructions for use. The team manager and team members who took the time to find, make, and take up their role will come up with good ideas about how to deal with any such incidents. If a manager has no idea what their management team is for, it is difficult to take up the role of chair of the team. Reed (2001) argued:

This idea of role as a regulating principle inside oneself provides a basis for defining the concept of "role," which does justice to, but also goes further than the other uses listed and is truer to people's real experience in working creatively in the systems they belong to. (p. 2)

The process of taking up roles helps us to clarify where one fits in an organization or group. This is a must for keeping the network of relationships healthy and functional. "On task" role behavior will build relationships that are transparent, communicative, exploring, full of strokes, empathic, vulnerable, and assertive, as described in TA as basic aims for autonomous individuals.

However, personal characteristics and characteristics of the system are everywhere and always intertwined in a complex way. Dooley's (1997) concept of semiautonomy is helpful here because it emphasizes relationships in which a person is aware of the possibilities and limitations the system offers for autonomous decision making. In colloquial language, the moment you enter an organization or group, that organization or group enters you (de Graaf, 2013). Thus, it is good to always take into account that when someone is in an organization or group, they act and speak not only for themself but also on behalf of the organization or group. Semiautonomy can mean that there is a certain degree of independence that allows for personal decision making, while there is also a certain degree of dependence on unconscious influences from within the system.

Finding, Making, Taking

As mentioned earlier, a role is never static. Internal factors and external environments are constantly changing. To clarify this, Reed (2001) proposed the analogy of a yachtsman who knows the general direction in which he is heading but is continually adjusting the sails and tiller (internal factors) to take the best advantage he can of the prevailing conditions of wind and tide (external environment) to achieve his goal (see also De Graaf & Kunst, 2010).

We learned at the Grubb Institute to summarize this process with the words: find, make, and take up. Those who find, make, and take up a role make it clear that they have concluded that they agree to take up a role in that particular system. The task and its associated responsibility are included in the contract (Berne, 1963). Remember that there can only be a well-defined course of action if the contracting parties know what the system in which they take up a role is for.

Every system has a purpose, even if one is not always aware of it. A family is built to raise children and to create a safe and meaningful base for its members. A school has the purpose of educating pupils toward adulthood, meaningful jobs, and a contribution to society. A supermarket has the purpose of delivering quality food to customers. TA organizations have the task of promoting TA and stimulating further development of theory and good practice of TA application in the four fields. It is interesting how the recent transformation of the ITAA into a professional organization will influence the role, task, and responsibility of its members. After all, the clearer the ITAA is about its purpose, the better the staff and members will be able to take up their respective roles with the associated tasks and responsibilities. Keeping the system's purpose in mind supports the development of the person-in-role and the teams(-in-role) in the organization so that they can relate their behavior directly to the primary task.

However, it could also be the case that by exploring personal needs and personality development, someone may conclude that the task and responsibility offered in the system does not match their own personal needs and/or the requirements of the other systems of which someone is part. It should now be clear that a role is developed through exploration of the personal qualities and taken up in a dynamic process. If we analyze that process further, we observe that whoever takes up a role will need to:

- First, explore their own personality traits. Script analysis helps us to better understand how our current life patterns originated in childhood. These patterns may no longer be effective or appropriate for our lives and work as mature individuals and can hinder us from shaping specific roles in a pure way that does not help us take on specific roles. And in addition to one's script, the role taker has to understand the meaning of one's present life values, needs, commitments, and obligations.
- Second, explore the aim of the system of which they will become a part. As mentioned earlier, you can only effectively take up a role in a system if you know what the system is for. The person who takes on a role in a system enters into a contract (a bilateral agreement) with the system.
- Third, take ownership of that aim as a member of the system. The characteristic
 of a contract is that a workable contract is concluded at the level of the Adult
 ego state. By thinking about this, gamey situations will present themselves
 less easily because, in making the contract, all parties involved are taken into
 account as much as possible to engage in a clear and committed contract.
- Fourth—and this is the core of the process of role taking—choose the actions and personal behavior that best contribute to achieving the aim that integrates the uniqueness of the person with the primary task of the system the person is offering their services to.

De Graaf and Kunst (2010) wrote of "struggling with the role" (p. 25) to indicate that taking up a role in a system will always be a process of trial and error. And, of course, whoever learns best what can be improved will become skilled and more conscious in taking up a role. Relationships will be more manageable and role boundaries more explicit. The relational network of which one is a part will benefit from this.

Role Concept by Schmid

The frame of reference concerning role used in this article is quite different from the description of role that EBMA-winning author Bernd Schmid (2008) used. He explored how roles can differ in three areas of life: the private world, the organizational world, and the professional world. He defined a role as a coherent system of beliefs, feelings, behavior, and perspective on the reality and the corresponding relationships. In that sense, Schmidt focused more on the coherence of the role taker in different static contexts. This is a more situational, static, functional perspective on role that can vary through the actual interactions the person is involved in. In the psychodynamic systemic model of role, the focus is on the impact of the continuous dynamics both in the person and within the system and how these two energies are related in an ongoing explorative process, regardless of in which world the person is acting.

The Interface Between Person and System

Note that we not only talk about organizations but also use the word "system." A system can be any activity that has an aim and in which we can define a boundary between the internal world and the external world (Armstrong, 2004). This boundary

can be clear, diffuse, or rigid (Minuchin, 1974). Boundaries of a system are the rules (contract) defining who participates in and around the system and to what purpose. Diffuse and rigid boundaries contribute to a system becoming dysfunctional. People who are part of such a dysfunctional system will find themselves entangled in the network of relationships. Effectively taking up a role in such a dysfunctional system is almost impossible because making contracts with often invisible internal and external informal stakeholders is a mission impossible. Minuchin (1974) came up with an insightful example of how a parent takes up their role in their family system by defining the boundary. For example, a mother tells her older child to stop parenting his younger brother: "If he is riding his bike in the street, tell me, and I will stop him." The mother ensures that the boundary that threatened to become diffuse became clear again. She thus ensured a healthy relationship between her children.

Especially in systems such as groups and organizations, it is important to keep relationships healthy. It is the task of the Parent system (management) to keep boundaries clear. Role awareness is extremely helpful here, and mutual relationships benefit greatly from it. A system with diffuse or rigid boundaries will focus more on surviving and on balancing with anxieties. Ensuring clear boundaries contributes to healthy containment. The clarity of the boundaries within a system is a useful parameter for the evaluation of healthy system functioning with healthy relationships.

Thus, role can well be seen as the interface between a person and a system. The role a person takes up defines the nature and quality of the relationships they enter into and maintain. Figure 1 shows this.

If role takers are able to effectively establish balance between personal qualities and the demands of the system, one can say that the person-in-role is managed by the integrated Adult (Berne, 1961). This is, in the words of Stewart and Joines (1987), the Adult ego state that incorporates the positive qualities of Child and Parent. The person teaches what they preach and walks their talk. They explore the unknown with curiosity and a professional attitude, a sine qua non for maintaining healthy relationships.

A Person in Role

Knowing and understanding the meaning of being a "person in a role" is everywhere and always important to keep relationships healthy and happy. Paraphrasing Watzlawick et al. (1967), we can say "you are never not in a role." Many conflicts in our professional and private life arise because there is insufficient awareness of being in role.

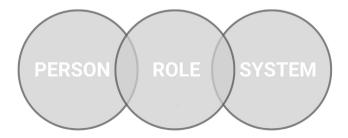


Figure 1. Person–Role–System.

The system/the organization

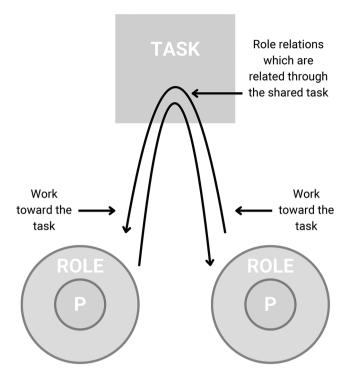


Figure 2. Person, Role, System, and Task.

Most often there is no conflict at the level of persons but rather a conflict at the level of roles. The confusion often arises and increases because there is also transference and countertransference going on. "The recognition of diverse transference mechanisms allows the transactional analyst to focus correctly on the transactions the patient has with him" (Moiso, 1985, p. 200). And most importantly, role awareness can help untangle and, better still, prevent these entanglements.

People in our Western individualized world too easily forget that they are part of a specific system with its own tasks, expectations, and dynamics. Especially under stress and often acting from script beliefs, they react as if they are in a personal relationship and not in a relationship related through a shared task. They contaminate person and role (Berne, 1961). Then, decontamination of person, task, and role is the work that has to be done.

A powerful example from our work with client organizations is helping those organizations make a transition from a family culture to a professional culture. Family cultures are often informal and driven by subjective dynamics. People communicate from a person-to-person frame of reference. Emphasis is often on the process. Professional cultures are more formal and businesslike with the emphasis on the result. Performance evaluation is done from a person-in-role mindset.

For those who adopt a person-in-role perspective, the direct task they are working on and the primary task of the system are continuously detectable. Observing persons on-task, we can identify the task-oriented teacher, the task-oriented parent, the task-oriented nurse, and the task-oriented police officer through their thoughts and, primarily, their behavior We can scan their Adult ego state through the use of the behavioral diagnosis as Berne (1961) described by analyzing their demeanor, gestures, voice, and vocabulary to understand the transparency and functionality of the role as taken on by the role owner (see Figure 2).

It is becoming increasingly clear that the interactions between persons-in-role are defined by the primary task of the system. People in organizations and groups who behave functionally and transparently are related to each other through the task to which they are committed. It is the defining characteristic of the organization (Armstrong, 2004). Their role relations are transparent and therefore comprehensible. The behavior of the role owner can be observed as being in line with the primary task of the organization or group. Person, role, system, primary task, and role relationships are important building blocks of the psychodynamic systemic perspective on relationships both private and professional.

Staying in Role

In the ideal situation, people stay in role all the time. The key skill for staying in role is to be able to contain the anxiety in the system together with the personal anxieties the person is facing in both their professional and private lives. In healthy systems, there is space to share personal experiences occasionally to understand the person's state of mind and to give personal support if necessary. Personal relationships will be established and valuable positive strokes can be exchanged. This will help the participants to take the transitional step to shift from their personal system toward the primary task of the system and to take up their specific organizational role.

Over the years, we have increasingly doubted the positive and optimistic view of groups and organizations that underlies what Eric Berne (1963) proposed in his book The Structure and Dynamics of Organizations and Groups. Although offering a valuable analysis of many aspects of groups and organizations, it lacks the exploration of subjective dynamics of which the members are part. We do not blame Berne and read his books holding in mind the time in which he wrote them. Much research and reflection on the countless derailments of groups, organizations, and even nations make it clear that groups and organizations are complex beyond belief.

If the anxiety grounded in organizations or groups is too great and/or too difficult to bear, people will escape by stepping out of role. This means that they will violate a boundary in the social or interpersonal field (Hirschhorn, 1988) and enter personal dynamics with all invitations to mobilize their personal script issues instead of working from role. Relations will be blurred by personal needs and anxieties, and a new chain of interactions will develop in which projections and introjections will tumble over each other. This anxiety chain will spread over time and space, and games will be played (Berne, 1963). So, paradoxically, when people stay in role, they are more transparent as a person than when they step out of role. However, this is not a rigid plea for a superegual management design. You cannot have an ongoing democratic discourse when designing an assembly line for the car industry. Rather, you need dialogue about the actual work processes and the dynamics as experienced within the work to create and maintain reciprocity in all interactions at work, even when asymmetrical power relationships are organized (Eusden, 2011).

Intermezzo

We agree with the coeditors of this edition of the *Transactional Analysis Journal* that "relationships continue to remain central to our practice" as transactional analysts (McLean & Rowland, 2023, p. 9). The idea that all people, everywhere and always, take up a role has, in their experience, been particularly helpful in building and maintaining relationships in all TA fields. You could say that we, just like the *TAJ* coeditors, reviewers, and managing editor also take up a role in a system. Looking for the purpose of the *TAJ* system, we read on the ITAA website that "the *TAJ* is published to advance the theory, principles, and practice of transactional analysis" (https://itaaworld.com/about-ta/ta-journal/).

The strength and success of the *TAJ* certainly lies in the fact that all those who take up a role in this system seem to know what the system is for. The temporary relationship that we as authors built and maintained with those involved was characterized by open communication, effective cooperation, and mutual understanding. While performing the task, strokes were exchanged. The coeditors, in their invitation to contribute to this theme *TAJ*, noted that "the nature of relationships in love, play, and work are in constant ongoing dynamic transformation and reformation" (McLean & Rowland, 2023, p. 9). We could not agree more. The common thread in this contribution is the question that must be asked again and again: What is the purpose of the system in which I take up a role and what are the associated tasks and responsibilities?

Conclusions

This article describes the relevance of practicing the analysis of role taking in all areas of life as an ongoing task. All people go through all phases of life with associated relationships, both personal and professional, ideally learning and developing themselves. They have the task of adapting what they need and have to offer in the here and now to the many systems to which they want to contribute or to which they feel connected. Systems are also never static but adapt in a dynamic way to the contexts in which they are embedded. Role is, in this sense, the interface between person and system.

Reflecting on the process of finding, making, and taking up a role helps people to explore the relevant dynamics they face in building and maintaining relationships. System psychodynamics makes a major theoretical contribution to this process and offers a practical framework for transactional analysts to use to manage self and others. Managing yourself in role is a crucial process for understanding yourself in the dynamics and challenges of relationships. Managing yourself in role means working on the primary task of the system to which you contribute. Managing yourself in role also helps you to understand that when anxiety increases, individuals—including you—tend to pursue goals other than this primary task. This task shifting can be

described as going off task. This is never a good idea. Role behavior on task will build relationships that are transparent, communicative, exploratory, full of humor, empathetic, vulnerable, and assertive, in line with what is so precious in transactional analysis: autonomy. Or should we say semiautonomy?

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