

## Agile2009

- **Boundary, Authority, Role and Task**
  - **The BART System of Organizational and Group Analysis**
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# The BART System of Group Analysis

- 45 minute presentation roadmap
  - **Part 1** (Overview): Boundary, Authority, Role and Task
  - **Part 2** (Details): BART Analysis Elements in Detail
  - **Part 3** (Simple Case Study): BART Analysis of the Scrum framework
  - **Questions and Answers**

# Part 1: Overview



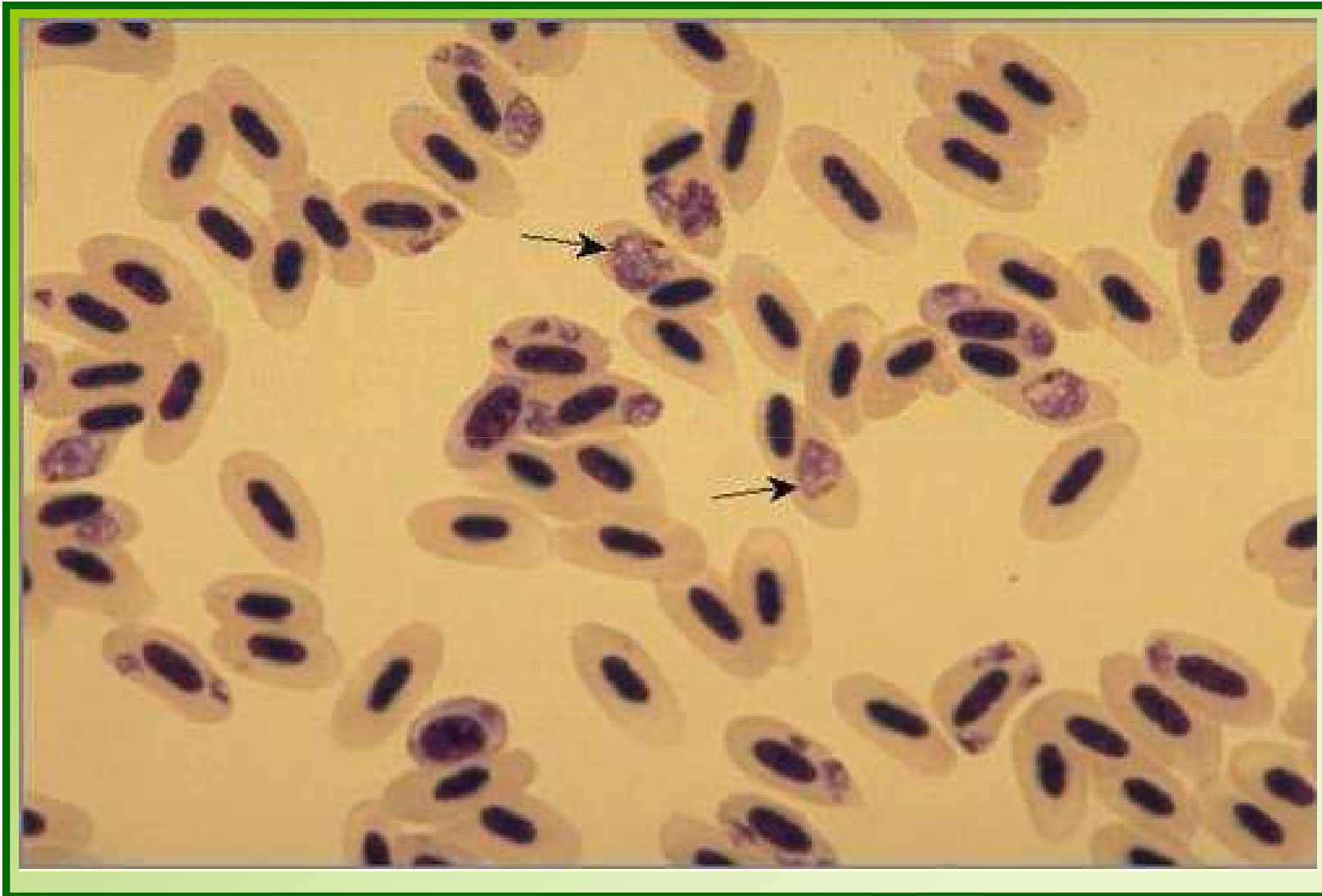
# The BART System of Group Analysis

- Overview
  - Work is hard to perform in groups when everything is a negotiation
  - Fuzzy definitions for BART elements can lead to huge amounts of WASTE
  - Ground rules strongly influence culture
  - Authority and associated boundaries form composition of ground rules

# The BART System of Group Analysis

- Why you care
  - BART is a tool for understanding yourself
  - BART is a tool for understanding other individuals
  - BART helps to understand the “group as a whole”. You can use BART analysis to help make sense of the groups in which you participate.
  - BART is a framework for making sense of social complexity

## Part 2: Details



# Boundary



# The BART System of Group Analysis

- Boundary
  - The container for work
  - Types
    - Time (deadlines)
    - Territory (borders and perimeters)
    - Resources
    - Task (a key boundary type)
      - Task boundaries (time for example) are often subverted, ignored, or outright violated

# The BART System of Group Analysis

- Boundary Types
  - Boundaries on Physical Spaces
  - Boundaries on Roles
  - Boundaries on Responsibilities
  - Boundaries on Resource Access
- Resource Access Boundaries
  - These boundaries often determine ultimate success or failure on a project

## The BART System of Group Analysis

- “Boundary Culture”
  - Rigid, fixed
  - Fluid, variable based on context
- Group culture is defined in part by the boundary styles an organization adopts and accepts as norms
  - Clear or undefined, rigid or fluid
- Boundary is “container that holds the work”

## The BART System of Group Analysis

- Healthy, productive boundaries are:
  - Clearly specified
  - Agreed upon
  - Adhered to
- Boundaries can be simple or complex
  - Example: Narrow, well defined thin line
  - Example: Boundary as a wider, thicker line (itself a “region”) that forms a perimeter

# Authority



# The BART System of Group Analysis

- Authority
  - “The right to do work”
  - Formal Authority: Delegated
  - Personal Authority: defined by the individual taking up his or her formal authority
    - It is here that all sorts of interesting dynamics manifest and take shape and form

## The BART System of Group Analysis

- Factors influencing personal authority are varied, and a person taking up the authority associated with a role **MAY NOT BE AWARE** of all the factors:
  - What you think they think
  - What they think you think
  - Desires and fears
  - Effects of these factors:
    - Important decisions may be postponed endlessly

# Role



# The BART System of Group Analysis

- Roles
  - PEOPLE occupy Roles
  - Formal Roles- well defined
    - Contain clear authority definitions including boundaries on that authority
  - Formal Roles- poorly defined
    - Contain unclear authority definitions, and very fuzzy boundaries on that unclear authority

# The BART System of Group Analysis

- Example: The Police Officer Role
  - Clear intersection of Role, Authority, Task
  - Real life is seldom this clear in the roles we take up at work ... and socially
- Misperceptions about Role occur frequently
  - Uniforms, robes and other forms of dress help keep Role unambiguous.

# The BART System of Group Analysis

- Roles
  - Role always has authority and associated boundaries
  - Misperception of Role is always a misperception of authority and boundaries related to that role
    - Example: If a Manager is authorized to do performance reviews but subordinates are not aware of this fact, they in fact behave differently.

# The BART System of Group Analysis

- Role dynamics
  - Role Transitions: Previous Roles inform new Roles
    - Example: Promoted to a new position
  - Multiple Roles: Require frequent clarification
    - Requires a communication of specific clarity for self and others regarding the role you are in at any given time
      - Example: Scrum Master who also is a Team member from time to time

# The BART System of Group Analysis

- Informal Roles
  - Taken up with personal authority (these roles are not formally authorized)
  - These roles fill the gaps of authority that are:
    - Abandoned
    - Ceded
    - Yielded by org or group
    - Discovered later, after formal roles are defined which define the situation

# The BART System of Group Analysis

- Informal Roles: Examples
  - Caretaker roles
    - Bringing the donuts & coffee
  - Coordinating roles
    - Regulating the flow of work
  - Antagonist roles
    - Questioning every decision & procedure
  - Steering roles
    - Influencing group-level attention
      - Directly and indirectly

# The BART System of Group Analysis

- Informal Roles
- Depends on “valence”
  - Valence is your tendency to take up specific roles
    - Internal factors: temperament, preferences
  - Your valence is mostly unconscious
    - The types of roles you take up typically do not change as you move from group to group
    - Valence is activated to regulate your anxiety
    - Valence influences formal and informal role

# The BART System of Group Analysis

- Role Essentials:
  - Formal roles require complete descriptions
    - For Authority and Tasks and related Boundaries
  - Awareness and understanding of our formal and informal roles
    - This awareness allows you to deliberately choose alternative roles that may be more effective in completing the group's task.

# Task



# The BART System of Group Analysis

- Task
  - Is unique now
    - Time is different, now
    - You are different, now
  - Importing history and experience to a task
    - We all do this
    - “Baggage”: re-enactments of previous wins and losses in executing this task
    - “curious and often dramatic reenactments” of past experience in groups

## Part 3: Scrum in Context



# BART Analysis of Scrum: Tasks

- **Task Essentials**
  - Clarity about the task for all involved
  - Someone in the group must be able to distinguish and describe all the tasks
  - Realize tasks are unique each time, because of factors that influence the task (date and time, current perceptions about the task, etc)
- Name some tasks of software development that Scrum does not define. (Note: Scrum is not just for software)

# BART Analysis of Scrum: Roles

- Role Essentials
  - (formal) **Roles** require complete descriptions
  - For Authority and Tasks and related Boundaries
- Discuss formal Scrum roles in terms of completeness of descriptions
  - Note the direction of this discussion, here and now

## BART Analysis of Scrum: Authority

- Authority is effective when it is:
  - Clearly defined
  - Taken up appropriately
  - Bundled with the tools to exercise it
    - Example: you have authority to run meetings but are denied access to the meeting-room resource
- Exercise: Name a spot in Scrum where Authority is not clearly defined.
- Exercise: In Scrum, name who exactly has authority over a specific ceremony

## BART Analysis of Scrum: Boundaries

- **Boundary Essentials:**
  - Clearly specified
  - Agreed upon
  - Adhered to
- Exercise: Name a **clear** Scrum boundary
- Exercise: Name a **fuzzy** Scrum boundary

# Insights about BART



## How to Reach Dan

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# Boundary, Authority, Role, & Task

