• 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
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• 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
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• 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
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• 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
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- **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
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- **“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”
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- 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
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• 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
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- 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
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• 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

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- 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.
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• **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.
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- 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
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**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
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• 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
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- 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
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• 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
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• 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
How to Reach Dan

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