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

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(in full collaboration)

Introduction

In the United States of America, group relations conferences, often termed “Tavistock” conferences, have been held since the mid 1960’s. The method of learning is through experience and reflection upon one’s experience. Theory of this method of learning has been described in many a publication (Bion, Banet & Hayden, Colman & Bexton, Colman & Geller, Cytrynbaum & Noumair).

This article provides an introduction to a key system within this tradition of learning, known as the BART system. BART is an acronym for four elements of group analysis:

- Boundary
- Authority
- Role
- Task

The authors wish to be among the first to stipulate that BART, while an exceptionally user-friendly tool, provides only a partial application of the type of learning that comes through the group relations work. The learning from such conferences can be powerfully personal yet has been found to have rich application to human systems analysis, ranging from a family dinner to board meeting to a multinational negotiation. Participants in group relations conferences may learn about aspects of group dynamics, such as the group’s reaction to authority, resistance to the task, and response to leadership. Participants may also learn about internal personal dynamics, particularly their own proclivity to take up a leadership role and other roles that support and/or thwart the task of groups. This article offers BART as an example of readily useful constructs that tend to be consistently present in study and learning from the group relations perspective. The application of these insights is of particular interest to managers and executives, but is likely to have value to anyone who works in an organization, participates in work groups, or is on a professional team.

First one major caveat about the use of the BART system is needed. Group relations conferences have psychodynamic theoretical underpinnings that place emphasis on

unconscious elements of systems. Through this method, trained consultants provide commentary or interpretation about their perception of the emergence of unseen and unarticulated events as they are happening in a group. Using the Gestalt therapy term, conferences give focus to “here-and-now” experiences, which by definition are ever fluid and changing. Such attention on the moment, with the unit of analysis being the group, creates regression in individual participants, providing them no familiar bearings for their experience. The anxiety that tends to emerge from this regression provides the conditions for profound learning in most participants and deep defensive resistance in others. These processes are the more subtle, ineffable, but foundational elements of group relations work. Some would argue that BART is unduly reductionistic, tending to make too facile dynamics that run quite deep and cannot be subject to a mechanistic acronym. The authors of this article accept these arguments. One is not able to extrapolate an understanding of group relations experiences simply with an intellectual grasp of BART. The effort here is to make accessible to more general audiences some of the key learning from group relations work that otherwise tends to be steeped in its own jargon.

The main focus will be on Boundary, Authority, Role and Task. We will describe the concepts and apply them to the organizational context.

Boundary

Boundary is the container for group work. We encounter boundaries constantly but may not experience them as such. *Time, task, and territory* provide the basis for the study of boundaries in group relations work. The conference metaphor for time is the strict adherence to the beginning and end of group sessions by staff consultants. It is not uncommon for a participant to be mid-sentence when a consultant appears to leave abruptly at the appointed hour. Participants get confronted with the rigidity of the time boundary and soon not only learn “when it is over, it is over,” but upon examining their own reactions and the reactions of the group, the learning may become much richer. While conversation may continue after the departure of the consultant, the boundaries shift with the absence or presence of someone in a designated authority role.

In every day life we have deadlines, due dates, departure times, and the like to which we must adhere. Failure to attend to these time boundaries carries consequences, depending on the rigidity of the boundary. Anyone who has ever been late to a train station or an airport knows this fact. If you are not at the gate at the departure time, the doors will be closed and your travel plans will be altered. A missed deadline may have no or limited consequence in certain contexts while in others it may mean a lost opportunity or in more severe situations, the end of a professional role.

In a similar light, territory boundaries are easy to spot. They are the space in which work happens in a group. In most offices or organizations, we often speak of “turf battles,” meaning the metaphoric territory where one person or group’s responsibilities ends and another’s begins. In every police drama, regardless of quality, there is inevitably a scene where there is a jurisdictional dispute about who is to take the lead on cracking the big case. In such instances, territory boundaries are tied to task, which will be detailed later.

The more common issue of territory as boundaries often comes in the form of more literal ones. If we look to nation states, on every continent there are currently and historically contentious issues about boundaries. Wars and unrest in global “hot spots” can be tied, among other issues, to disputes over the demarcation of territory between one group and the other. These spaces become markers of identity, carrying with them more than a geographic line in the sand. We need only to turn to different expression of conflict such as those in the Middle East between Israelis and Palestinians, or in Kashmir between India and Pakistan, or in Rwanda between the Hutus and the Tutsis, or in the United States between the “red states” and the “blue states” to see the power of territory boundaries—those that are physical and those that are in the mind—at work.

While territory and time boundaries are perhaps easiest to see, in group relations work, the task boundary is key. The way the work is understood and the manner in which it is to be conducted strongly influence nearly every aspect of group life. Turf wars provide a way of noting differences *between* groups about the nature of the task. The challenge is when there are different understandings of the task *within* groups. In day-to-day parlance, the task is akin to the mission of an organization, the terms of reference in a business contract, the syllabus for a course, or a work order in a repair shop. Within loose or tight parameters, the group is to do its work. Yet most of us can think of examples from our own experience where the clearest delineation of the task has resulted in varied and at times undesired outcomes. From the renovation of our home that is not yet really complete, to the work team that produced a less than desirable deliverable, to the board that emphasized funding over organization values and focus, to the engineers that designed a bridge that collapses, the task somewhere got lost, or the boundary as it relates to the task was undermined, subverted, or simply violated.

Boundary considerations extend beyond time, task and territory. Included in this analysis are boundaries of *resources, roles and responsibilities*. The most important of these, resources, often determines the capacity of individuals and organizations to complete even the most rudimentary tasks. We can think of resource boundaries expressed and represented by basic survival elements such as air, food and water. Absent attention to resource boundaries, there is no life. Other resources, such as money in family budgets, the number of team members available to work on a project, or the kind of relief available to disaster ravaged areas, all are influenced by the kind of boundary involved. (In-)adequacy of resources and the management of them co-determine the success or failure of a project.

Some groups or organizations work better with relatively rigid time, task and territory boundaries, others prefer to work with more with fluid ones. Key is that there is clarity about boundaries of an organization. In addition it helps to understand the boundary culture within an organization. For example, a newspaper-publishing agency needs to have the newspaper print ready at a certain time, yet it needs to be flexible until the last minute in order to report the latest news.

Boundaries can be seen as a container that ‘holds’ the task. If the container is inadequate or has holes in it, it will not support the task. Although the concept of boundaries is

rather simple and therefore conceivably easily dismissed, the consequences of diminishing the importance of boundaries can be far reaching. Attention to solid boundaries is in service of the task. It is crucial that boundaries are:

- *Clearly specified*

Clear specification of time, task and territory boundary should answer the questions: “When?” “What?” and “Where?” During a specific time, in a specific location we will work on this particular task. Examples of inadequate boundary management are: two meetings may be scheduled at the same time in the same space, or two consultants are working independently on a similar policy because the task boundary between the two was not clarified.

- *Agreed upon*

Although a boundary may be clearly outlined, invested parties need to come to some agreement about what the stated time, task or territory boundary is or how they interpret it. If disagreement persists, there may be at least agreement on who the authority is that calls the boundary. This is where boundary and authority converge and where people in robes and uniforms - judges, umpires, police officers - can be very helpful. More will be discussed under the heading authority.

- *Adhered to*

If boundaries are taken as guidelines, rather than clear instructions in support of accomplishing the task, an organizational culture can become rather chaotic - for example meetings hardly ever start on time, tasks are forgotten or done twice, people are unclear on where the next meeting will take place. Especially in situations like this it may be helpful for an organization to ask what their use of boundaries represents.

We like to introduce the concept of boundary as a region (and acknowledge Charla Hayden who used the term in the A.K. Rice Institute National Conference in 1998), where the space, time or task boundary is seen as a transition or bridge space. In terms of time boundary, the one event has not quite ended, yet the next event is already in people’s mind. Or an event has just started but people are still somewhat preoccupied with whatever happened before. One way of acknowledging the transitional nature of the beginning of a meeting is to do a check-in on state of mind- the length of the check-in depending upon the length of the meeting - so that attendees are in a position to acknowledge what they bring to the meeting, which generally speaking makes them more available for the present task. The entrance space to a person’s office or a meeting room is an example of a territory boundary transition region. In terms of task boundary, two departments with different tasks may have subtasks that are closely related and will need to manage that transition space or region. Seeing the boundary as a region allows for a transition function prior to and subsequent to the boundary and it may prevent the boundary from either becoming rigid or chaotic. Understanding boundaries as a region, may highlight the delicate nature of boundaries and the attention that requires. At times it is helpful to reflect upon the representation of how individuals and groups in an organization deal with boundaries.

Authority

We define authority quite simply as the right to do work. In his book *Leadership without Easy Answers*, Ronald Heifetz defines authority as “conferred power to perform a service” (p. 57). When a person takes up her authority we assume that she takes responsibility and that she is accountable for her actions. We make a distinction between formal authority and personal authority.

Formal or Delegated Authority

Formal authority may be derived from a group or body - the Board of Directors of a non-profit agency or corporation -- or from an individual such as one's immediate supervisor or manager. Authorization involves one person or group giving over or delegating some of their own formal authority so that another might do certain work on their behalf. For example, formal authority may be given to someone through a job description outlining his role in an organization, the role of manager comes with a particular job description of for example evaluating, hiring and firing people.

It is crucial that formal authority is:

- *Clearly defined*

Authority needs to be clearly defined by the body that is granting it and understood by the person or body that is receiving it. Lack of clarity about the scope of authority a person has been given may result in unattended tasks. Incomplete job descriptions or incomplete instructions by a person's supervisor may result in incomplete tasks or may cause an employee to do tasks that he is not officially assigned to do.

- *Taken up accordingly*

People are clear about the formal authority they have received but for some reason do not take up some of the authority that they have or take up too much authority. For example the Program committee not only has provided a program but also organized a fundraising event. Or the president of a non-profit organization has been given authority by the bylaws to name committee members but only with the consent of committee chairs. If she names committee members without the chairs' consent, she has exceeded her formal authority.

- *Accompanied by tools to exercise it*

It is not uncommon that people are authorized to do a certain task, but they lack the tools to complete the task successfully. In a non-profit context an example may be that a person is authorized to organize a lecture by the Executive Committee, but the committee does not make available any funds to support that lecture.

Personal Authority

The way an individual *takes up* formal authority we call personal authority. Personal authority is how we execute our formal authority. Personal authority is influenced by many different factors, i.e. our psychological make up, our social identity, our cultural -

background, etc. For example, the well-known Myers-Briggs Type Indicator in terms of extraversion and introversion, intuition and sensing, feeling and thinking, judging and perceiving influences how we take up our personal authority. An extraverted executive may consult many employees in groups and meetings while in a decision making process, whereas an introverted executive may delegate some of the consultation with employees to her subordinates and receive feedback through the subordinates prior to making the actual decision.

After formal authority has been established and clarified, a person has to take up her personal authority to execute her formal authority. Important considerations are what helps and what hinders a person in taking up their personal authority? Group relations work teaches that many factors play a role in how we take up our authority, and they span a continuum of things that are known to things that are unknown to us. For example a person may take up more or less authority depending upon how he thinks the persons affected by his authority will value his behavior. In such a case a manager may postpone an unpopular decision endlessly. People make decisions in part because of desires and fears that have little to do with task, but more with managing anxiety, particularly related to ambition, competition, political correctness, etc. The more individuals know about the elements that influence their authority, the more likely they may exercise personal authority in relation to the task.

Role

People occupy roles. The span of these roles is rather transitory yet robust, ranging from mere moments to a lifetime. Roles can be achieved, acquired, assigned, and/or ascribed to us. According to the goodness of fit, roles can be reflections of or equated with our identity. The link is made clearer through the distinction of formal and informal role.

Formal Role

A formal role is much like a job description. It defines the duties to be performed, the parameters for completing tasks, the people and processes with which interaction must take place, and often the outcomes or deliverables that mark the tangible successful performance of the role. Typically some external authority assigns these roles to us. Our bosses, managers, teachers, supervisors, and the like also serve as the arbiters of how well we take up these roles—and at times, determine whether we will continue in them. If the role comes through merit or privilege, we may have more range in how we take up our role compared to someone who is newly assigned a role. In other words, a history of exceptional performance and/or personal attributes (such as race, gender, age, etc.) that are valued by the organization or particular authority figure influence how the role is perceived and filled.

A perhaps easier way to think of formal authority is in terms of those individuals we call “authorities” more colloquially. Police officers are a clear example of where role, authority and task converge. We expect the police to fight crime, maintain general order, and give us tickets for traffic infractions. These authorities are readily recognized in their role by their uniforms and a general social agreement about the nature of their task.

Other roles where such social agreements are clear can be seen when certain people put on their robes (Sorenson, 1999). The vestments of clergy and the robes of judges come with some understanding of the nature of their formal role. When wearing these robes, there is authority ascribed to such individuals and clarity on the tasks they perform. These examples help us in understanding formal roles, yet many of the roles we take up don't have robes to go with them. It requires that individuals understand their roles and can clearly communicate what that role is. Clarity about one's role is not only important for the person who takes up the role, but also for the people who work with the person in a particular role. Misperceptions about roles occur frequently.

In addition, it is essential for a person in role to know how other people perceive her in that role and how that influences their behavior. Given that role is intricately connected with authority and boundaries, a misperception of the role may result in a misperception of authority and boundaries. For example, the role description of a team leader may include evaluation of team members and recommending them for promotion. It is likely that if team members are not aware that this is part of the team leader's role, they may give him less authority and their performance may be affected.

Finally, we want to say a few words on role shifts and on occupying multiple roles. With role shifts we mean moving from one role to another more permanently, for example the promoted colleague becoming manager, or the former professor being a friend. The former role influences how the current role is viewed and vice versa. Awareness of these role shifts may assist both parties in making the transition. Shifting between multiple roles requires that a person maintain clarity both for oneself and for the people the person is interacting with about what role one is in at any particular moment.

Informal Role

The informal roles people take on are not found in a job description or in any contract between employer and employee. Nonetheless individuals take on roles that serve to fill the gaps of authority and tasks abandoned, yielded, or implicitly ceded to them by the organization or group. These roles range several continuums: from simple to complicated, from more implicit to more explicit, and from conscious to unconscious. Let us give some examples. The care taking roles: who makes the coffee in the morning, or who changes the light bulbs in the office. A coordinating role - there are five project managers in an organization but no one has been designated to coordinate the projects, what persons steps forward to do so. The antagonist role is one example— the person who always questions every decision, procedure and change.

Both informal as well as formal roles are in part dictated by what our valence is. Valence refers to a person's tendency to take up particular roles in groups. For example a person may have the valence to be "the quiet observer" or "the practical voice" or a person may be "the emotional one." Given that a person's valence is an unconscious dynamic that gets activated to regulate anxiety, an individual's valence does not change much from one group or another, although it may be more or less activated in one or the other group. Generally speaking a person's valence influences both their formal and informal role.

For example, a person with a leadership valence is likely to have a formal leadership role, or when that is not the case to take an informal leadership role.

One of the authors, René Molenkamp, has developed The Metaphor Method for Role Analysis, a method of becoming clearer about one's informal role by making use of the unconscious through images and metaphors. Although the method was developed within group relations conferences, it has been applied to working groups. A brief description of what the method involves: a group member is interested in what informal role she plays in the group. All members of that group are silent for a moment and think of an image or metaphor for the person's role and write it down, including the person herself. Then, one by one, people share their images and metaphors and give a brief explanation of why they think that image or metaphor came to mind.

Two things are particularly important. One is to try to make links between the different images and metaphors and to see what they have in common (for example, movement, height, distance, elements, detailed descriptions). The second is to pay attention to how the person's own image or metaphor fits with the images and metaphors she received from other people. There may be discrepancy between how the person perceives herself and how other people perceive her, which can be painful initially but a significant learning experience.

To summarize, essentials related to role are:

- *Complete description*
An accurate and complete description and understanding of the formal role avoids role confusion and potential conflict with colleagues.
- *Understanding of both one's formal and informal roles*
Understanding how one's informal role gets activated and how it influences our formal role is the foundation of the ability to make different choices about group participation in the future.

Task

From a group relations perspective, the next task has never been done before. Yes, we may have a technical "fix" for a variety of circumstances, but the task remains dynamic. While a similar task may have been done previously, the change in the time boundary alone makes it different. Each person involved with the task also brings his or her perceptions to the moment. Conflicts arise when perceptions of the task differ from person to person or from group to group. In other words, we tend to import our histories and experiences to a task. Group relations work calls on us to be conscious of what we bring into a situation. In reality, most of us are engaged in curious enactments of past triumphs and tragedies related to similar tasks. What we have not resolved or what we have learned will work in other settings we will replay. In the former case we await some new outcome. In the latter, we seek to have our reality yet again confirmed. In short, if

there is an absence of consciousness about what is being imported, we can be assured that what will be exported will be inconsistent with the true nature of the task.

We distinguish different kinds of task. There is the *primary task* (also referred to as *functional task* or *work task*), which corresponds with the mission of an organization. Most organizations face multiple tasks all vying to be expressed in the service of the primary task. This is the point where authority, becomes central, i.e. the person who decides what task has priority. It is the authority boundary in conjunction with the task boundary that helps the task become clear and for the work of the group to be taken on successfully. Absent clarity at the authority boundary, destructive chaos is likely to result and the survival of the group is in peril. While in some instances such a collapse is desirable for the new to arise and for the task to be met. Yet from the perspective of the group that dies, the loss continues to live well after the time boundary passes.

When a group works on a task, members of the group always - albeit mostly unconsciously - have the survival of the group in mind. We call this the *survival task* of the group. "Although this fundamental task is frequently disguised or masked, survival as a group becomes the primary preoccupation and latent motivating force for all group members..." (Hayden and Molenkamp, 2002, p. 7). The primary task and the survival task co-exist, at times the survival task is in service of the primary task and complimentary but mostly it is in conflict with the primary task.

This survival instinct of group members is the foundation for off task behavior. Off task behavior can be distinguished in four categories: dependency, pairing, fight/flight or oneness (in group relations terms these categories are called basic assumptions). Dependency is when the group waits for one person to take leadership, as if other members don't have those skills. Pairing is when the group uses a pair to produce the solution in the form of a prophetic idea or person, oftentimes this happens in the form of a fight which may eventually result in some solution (thesis, antithesis, synthesis) or in the form of some emotional connection that 'enlightens.' Fight is when the group starts a conflict about relatively inconsequential things and flight is when the group either literally or metaphorically distances itself from the task, for example by members starting to take personal phone calls during a meeting, or by entering into fantasy land and thinking about the next dream vacation. Oneness is when the group acts totally undifferentiated, as if there is no difference of opinion let alone conflict within the group.

Finally, we want to discuss the *process task*. The purpose of the process task is to give attention to the survival task without necessarily acting it out. It provides an opportunity for members of a group to look at their own dynamics, including dependency, pairing, fight/flight and oneness behavior, issues of competition and authority, interpersonal relationships, trying to understand the meaning of behavior of an individual for the group, or group behavior as such. When a certain time is set to work on the process task it is likely to reduce the amount of off task behavior and it may enhance the work of the primary task. Attention to the process task can take place at the end of a regular meeting, or it can be a regularly returning meeting as part of a group's ongoing work together, depending upon the size of the group and the intensity of its work together.

It is crucial that

- All parties have great clarity about the task
- Someone in the group can distinguish the different kinds of tasks
- To realize that the task is always fluid because of factors that influence the way a person perceives the task

A BART analysis of a workgroup or an organization may assist in preventing loss of valuable resources, off task behavior, productivity decrease, not to mention stress, frustration and potential interpersonal and intergroup conflicts. The consequences of any of these problem areas are likely to impede or slow down the primary task and may ultimately be destructive for the good of the organization.

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Note:

This article is a work in progress. This is the first version. Updated publications will be marked as such.

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