

An Exploration of Role by Bruce Reed

1 BEING IN ROLE

Some common uses of the term 'role'

The term 'role' is used in writing about management and in everyday speech in a confusing variety of ways. Some of these are:

- ♣ a position in a hierarchy or organisational tree (roughly equivalent to a person's 'status');
- ♣ a job description: a set of specific duties and responsibilities attached to a particular position or job, which the job holder is expected to perform and against which his or her performance is judged;
- ♣ all the various expectations, overt or covert, which people have about the behaviour of someone by virtue of their position: in an organisation, a family, a club, or any other social system. For example in this sense one might talk of the role of 'head' in a school as 'the boss', the 'father figure', the 'arbiter' *etc*;
- ♣ a part someone plays, as an actor in a drama
- ♣ a skill to be learned by experience.

Limitations of these uses

Each of these uses, in different ways, suffer from a number of defects:

- 1 They are all **prescriptive**. They suggest that a role is wholly or largely defined **for** us: by our position, our job, the expectations of others, the script. At most they allow for differences of 'style', but not for differences of substance. This does not do justice to our everyday experience in the roles we have. For example, a job description may tell us about the range of activities, duties and responsibilities that go along with a job. But no one can do a job adequately by adhering slavishly to that description. Priorities have to be sorted, activities have to be related to new circumstances, decisions have to be taken in unforeseen conditions. None of this can be described in advance. One might express this by saying that one needs an idea of, or a feeling for the 'role' to make sense of the job, rather than vice versa.

Similarly, the expectations that bear on someone in a particular position do not define how he or she should respond. A manager faced with certain expectations or becoming aware of them, will, if he is competent, seek to weigh up what is giving rise to those expectations and how to take them into account in the work he does and the decisions he makes. Again, one might say he requires an idea or feeling of the 'role' of manager in that situation to make sense of people's expectations rather than vice versa.

- 2 A second related defect in these uses of 'role' is that they tend to be **static**. They do not acknowledge the extent to which in taking a role one is always relating what one does to a changing context, both within the organisation or group and in the environment within which the organisation functions and on which it depends for its survival and growth. Unlike roles in a play, the roles we take in real life are not written for us in advance. The script is always changing, we are always having to improvise on the basis of the best judgement we can make about what the script now is. (A father, for example, may find he has to reconsider what the role of father means when his son becomes an adolescent or a young man.)
- 3 The third defect in thinking about 'role' in these ways is that they seem to draw a very **hard and fast distinction between 'role' and 'person'**. This is most obvious in the last usage - 'role is a part someone plays', as if it is not real. In fact, however, many great actors are the first to acknowledge that to be able to give a truly convincing portrayal of a role in a play, one must be able to discover something inside oneself that is in tune with the character one is portraying, and for that period the person is identified with the role.

Taking a role: a different perspective

To take 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. So we speak of a **person-in-role**.

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.

Everyone who joins an organisation or group (whether they do so voluntarily *eg* a manager in a new post, a principal newly appointed to a college, a priest to a parish, or under compulsion *eg* a child goes to school, a convicted prisoner) comes into a particular position. This position may have assigned duties, responsibilities *etc* attached to it. It may also be subject to expectation in terms of what is seen as appropriate behaviour (either overtly or covertly). Neither the position nor the expectations define the role, nor do they enable the postholder to know how to manage his or her behaviour appropriately in the circumstances and situation he or she meets.

A role is defined ¹ or taken up

- ♣ as a person identifies the aim of the system ² they belong to,
- ♣ takes ownership of that aim as a member of the system, and
- ♣ chooses the action and personal behaviour which from their position best contributes to achieving the aim.

1 'fashioned' might be the more appropriate word.

2 *ie* the system, or sub-system appropriate to the position in which they have responsibility, which could mean the entire institution, a particular division or a unit or group.

Since circumstances are always changing, both within the working unit or organisation and in the context or environment, a role in this sense is never static. An analogy is that of a yachtsman who knows the general direction in which he is heading, but is continually adjusting the sails and tiller to take the best advantage he can of the prevailing conditions of wind and tide to achieve his goal.

2 PERSON AND ROLE

Role is an idea in the mind. We cannot see a role but we all behave as persons - all the time. By observing someone we can deduce from how they behave what their role is, *ie* we as observers form an idea in our mind.

A person may have many roles in the same group which has several sub-groups or sub-systems, *eg* in a family a man may have the role of husband, partner, father, parent, all interlinked but different. A **person**³ who is appointed to a position in an institution (**system**) and given a job description already has some of the ingredients for taking a role. The person also requires the necessary knowledge and skills to do the work, and a grasp of the task of the system and an appreciation of the other conditions, such as available resources and the state of the environment. They then set out to integrate this knowledge and understanding and use it to find a way of working which will best achieve the given task.

What is going on is that mentally the person is 'constructing' a set of behavioural patterns so that they can act in the situation to achieve the desired goal, which is defined in terms of the purpose of this human system of activities. Role is the patterning of ideas by which a person organises their behaviour in relation to a specific situation, seen as a system.

3 PSYCHOLOGICAL AND SOCIOLOGICAL ROLES

This subjective aspect of 'role', "how **I** behave", we call the **psychological role**. But there is another aspect of role complementary to the other which relates to the statement "how they behave". Anyone taking a role (psychological) is faced with the expectations and intentions of other people in the system - the parent of the adolescent, the employee of the employer, the congregation of the priest, the teacher of the pupil. These others have a set of ideas in their minds of how the person(s) they are in relation to might or should conduct themselves. This set of ideas we term the **sociological role**. This is the usage of social scientists generally in concentrating on role as an instrument in attempting to describe or predict social behaviour. It can be seen that the common usage of 'role' also falls into the category of sociological role, *eg* when teaching staff expect the new head to carry on in a certain way.

3 We give a fuller account of what we mean by 'person', differentiated from 'individual' in Bruce Reed - *Organisational Transformation* - in John Nelson (ed) "**Leading, Managing, Ministering: Challenging Questions for Church and Society**", Canterbury Press 1999

A person-in-role manages themselves in relation to their current circumstances - their context. Circumstances are always changing, both the internal structure of the working unit or organisation and the external, social, political and economic conditions of the unit. System boundaries are always being redrawn, like lines drawn in the sand below the high tide mark. In addition there are the feelings, attitudes and expectations of all the others involved imposing sociological roles on the person, either covertly or overtly. These complex circumstances and people holding sociological roles will influence the person-in-role but cannot define it. Only the person-in-role does this, and if it is done so that the purpose of taking the role is being realised, that person is seen as having 'autonomy', as 'managing themselves' and 'exercising authority'.

Role is dynamic: it is never a fixed pattern of response or behaviour. We have already used the analogy of a yachtsman who wishes to go to a certain place but in order to do so needs constantly to adjust the sails and tiller to make the prevailing winds and currents advance him in the desired direction, no matter which quarter they are coming from.

4 FINDING, MAKING AND TAKING ROLES

To take a role, the person needs first to **find** it and to **make** it. He or she has to identify the relevant **system** boundary in which they are working and/or living *eg* the classroom, the family, the department, the company, the hospital. Each person is a member of many systems - the system to select is that one where the person at the time is seeking to be something, or do something. A clue to that is the position they are in, or offered, *eg* a daughter, a managing director, a departmental head, a probation officer, a student, a prisoner. Having **found** the role and decided that they want to do something about it, the person then **makes** the role by examining the conditions of the system, its purposes, its culture, resources and constraints, their own aspirations, feelings, and the attitudes of others. As they form a mental pattern of as much of this information as they can digest, they develop the frame of mind to **take the role** - that is, to decide how to behave in order to achieve the task of that system.

There may be a discrepancy by the person between their **intention** to behave in role and their **practice** in taking their role. This usually occurs when the person **finds** the role but is unable to **make** the role. Some reasons are: not being clear about the aim and purpose of the system; the ability of the person to cope with the pressures either personal or institutional, and failure to maintain integrity of the role for the primary benefit of the system but use it for the well-being of the person-in-role.

This can be summed up as follows. There are three interlinked processes involved in being in role:

1 **Role needs to be searched for and found**

- understanding the boundaries of the system and its aim and purpose
- the system becomes an 'organisation-in-the-mind' and the role emerges as a mental-construct for the person.

2 **Role needs to be *made***

- understanding how the system functions, changes, variation in context, *etc*
- cannot be defined in advance but through interacting with circumstances
- not the menu but the meal - the experience of eating, not just a (job) description of the meal
- not the recipe but the dish - ingredients need selecting, mixing and cooking to make them real
- uses positively, both internal and external forces - often seen only negatively;

eg in sailing the yachtsman needs to choose his destination, and then use the weather conditions to steer to the desired harbour. The skill is shown in handling headwinds, rough seas, adverse currents *etc* by using the sails, rudder and distribution of weight to drive the boat by tacking *etc*. The sailor turns the negative into positive by this means - so it is with role-taking.

- the psychological role enables the person to experience and manage high levels of stress without burnout (which is the common result of not working in role)
- the sociological role pressure from others' expectations may make the person-in-role question whether the purpose of taking the role in his/her mind is really for the benefit of the system or not, so their purpose needs to be defined from the start.

3 **Role needs to be *taken***

- for the benefit of the system and those in it
- needs to be fluid, flexible, dynamic, holistic

Developing the Role

♣ **Being in role is a ceaseless disciplined process**

- once taken - easier to *find*
 - once found - easier to *make*
 - once made - easier to *take*
- an upward spiral of knowledge

♣ Role is a tool for **managing learning**, one's own and that of others

- Role - a formed idea-in-the-mind leading to action
- Role - the outward and visible behaviour of an inward discipline of knowledge, thoughts, feelings and will.

5 DEFINITION OF ROLE

A role is a mental regulating principle, based on a person's living experience of the complex interaction of feelings, ideas and motivations, which are being aroused in carrying out the aim of a system, and is expressed in purposive behaviour by the role-taker.

6 POWER AND AUTHORITY

Role transforms power into authority. This introduces another function which conditions this transformation, that of authorisation. A person's actions can be 'authorised' by others only if they are considered as working in a system within limits (boundaries) which enable the actions to be understood as carrying out the aims of the authorising body, by accepting accountability for their actions. Hence others also functioning within these limits experience freedom if they can take the role to exercise their own authority. Just as a role cannot be **given** to a person, neither can authority be given, it needs to be **taken** by the person in the appropriate role. All the trappings of authority are experienced by others as power unless this occurs.

Therefore, within a human system, a person-in-role can exercise authority, whereas a person in a network of relations without boundaries can only use power for good or ill. If one party takes up a role in one system, and at the same time another party takes up a role in a different system, and the two parties do not share the same boundaries or systems, they will perceive each other as *not* being authorised. Hence only power relations can operate between them. This explains some of the ceaseless wrangling over some border disputes among nations *eg* the Northern Ireland peace process.

7 AN EXAMPLE OF THE VALUE OF WORKING IN ROLE

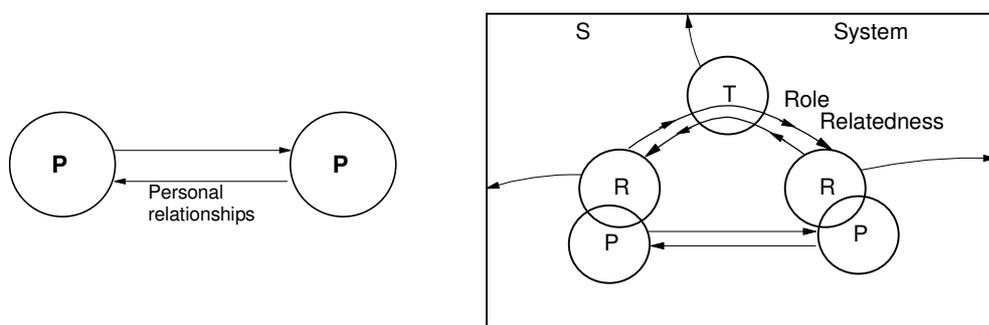
In thinking about relations between people in a working situation, it is useful to distinguish between two ways of seeing those relations.

The first way is to see them in terms of personal relationships: how I as a person relate to and feel about you, disregarding context, position and background. If I see my relations with others in this way I will place emphasis on getting to know people, trying to be friendly and will judge the quality of my relations with them in terms of liking or disliking, getting on with or not getting on with them, whether we share things in common, *etc.* In business, great emphasis is placed on developing good personal relationships in this sense. It is felt to be a healthy corrective to the assumed tendency of managers to see relations with their workforce only in terms of institutional goals and objectives. An unresolved difficulty with this approach comes when you were unable to 'like' someone or get on with them, or when the needs of the business put 'personal relationships' with people under pressure, so people avoid sharing bad news to preserve their personal relations.

The second way is to see relations with others in terms of relatedness. To see things this way is to recognise that, although I may not know someone (if I am joining an organisation or a group for the first time I may not know anyone), I already have a relatedness to them as co-members of this organisation or group. This relatedness is not based on the fact that as persons we happen to be in the same situation, but on our being persons-in-role within a common shared body (a course, a team, a school, a church, a company). As members we may have different roles, but these roles are all derived from the one organisation we belong to. We are related to each other through our working roles, whether or not we are aware of it.

If I focus on my relations with others through our roles, we will not be preoccupied with getting to know them, cultivating personal relationships, whether I personally like or dislike them. I will be concerned rather with seeing my relations with them in terms of the task we are working at together, ie recognising each other's roles. I will be aware that insofar as we are working at the same task we are doing something on behalf of each other, even if we disagree. To the extent that we acknowledge the same task, we are free to disagree, challenge and be challenged, become angry, without fearing we will prejudice a personal relationship; or feeling guilty, because we accept that the criterion for what we say or do is whether it advances the task we are working at together. We are also open to being proved wrong in the process.

The difference between these two ways of seeing relations with others can be represented in the following diagram.



The left hand figure shows **personal relationships** between two people. The right hand figure illustrates that when they take up roles (R) to carry out a common task (T) in a system (S), they have a **role relatedness**.

As this right hand figure implies, relatedness does not ignore that people may also establish personal relationships. In the longer run, awareness of relatedness may enhance the value of personal relationships and increase their range because it cultivates respect based on the shared experience of working together. But by placing relationships in a defined context, it enables people to discover the relationship they wish to make with each other, without forcing the issue.

8 TRANSFORMATION OF ROLES

Transformation of roles is expressed through the change of behaviour of persons in their work in their system. Three constructs (or ideas in the mind) are continuously interacting - person, role, system.

In the present, the current understanding by the person of the system as it is, is a major factor in the fashioning of the role by the person. If the person for some reason changes their perception of the system, either because of something in themselves, or because the system itself has been transformed by reason of contextual forces, then (the shape of) their role will be transformed. Their behaviour changes will express this.

This transformation will most probably be concurrent with a personal acceptance of the conscious and unconscious factors which are affecting the person's thoughts, attitudes and beliefs. These in turn will alter the way the people fashion their roles within the system as it is, or as it is becoming. These transformations will both reflect and generate new forces within the person and in the system politically and spiritually as persons-in-role experience new relations and respond to new projections and introjections from others.

Not only systems but also aims may be transformed with the inevitable challenge to desire, belief and motivation. This can result in fragmentation or deeper coherence among the relevant people as they consider their impact.

In this process of transformation personal qualities will determine how the inevitable risks, confusion and uncertainty are handled. The more that persons can find, and re-make, and take their transformed roles, the greater their ability to contain these anxieties without being blown away by them.

9 OUTCOME OF EXPLORING WORKING IN ROLE

Experience of The Grubb Institute has indicated that sessions need to be continued with clients over 2 weekly intervals⁴ until the client gains the facility of being able to find, make and take their different roles in a variety of contexts under sudden and unexpected changes. In other words role is always dynamic and the person taking it needs to be flexible, to live with uncertainty and confusion, and to take risks. All these conditions need to be expressed in behaviour and in making decisions and taking actions.

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4 Bruce Reed (1997), **Organisational Role Analysis**, The Grubb Institute,