

UNDERTAKING A ROLE ANALYSIS

In talking about role, we are not thinking in terms of a person's position description or job description. Our understanding of role is that it is the patterning of ideas by which a person organises their behaviour in relation to the specific situation. It is about how I, as a person, behave in relation to the system – and contribute to it through my role.

... Role is subject to changing pressures – like a candle flame constantly changing shape but continuing to provide light. In a changing context, the person-in-role is rather like a yachtsman trying to sail from A to B; he knows where he wants to arrive, but must constantly adjust rudder and sail to cope with and exploit the vagaries of wind and tide.

Quine & Hutton(1992, p. 2)

Anyone entering a new role or experiencing a change in their role must engage in a process of discovering what the role means for the organisation, their staff and for themselves.

In order to be effective it is important that we build a shared understanding of our role, in consultation with our managers, peers and other significant stakeholders.

To support you in taking up your new role, you and your manager will undertake a structured role discussion. The intent of this discussion is to help you clarify your role and to gain confidence, knowing you are authorised and supported as you enact your role.

The accompanying ideas and worksheet provide a framework and common language for reflection and dialogue. They are intended to stimulate your own thinking and support conversations with others.

Please read the following material and complete the worksheet prior to your facilitated conversation with your manager.

FINDING, MAKING AND TAKING YOUR ROLE

Quine and Hutton (1992) describe three stages usually involved in fully inhabiting any role. For each of the stages below, please reflect on the questions provided. The answers to several of these questions may not yet be clear. If so, think about how you can research them and build a rich organisational picture.

STAGE 1: FINDING THE ROLE

Developing an understanding of the organisation as a whole

- What are your organisation's strategic priorities?
- What do you know about the current operating environment?
- What are the current challenges for leaders and staff?
- What services will support your key clients?
- Where is your knowledge robust? What are the gaps?
- What do leaders and staff expect from you right now? How does that sit with you?

Developing an understanding of your staff

- How are your direct reports managing the transition?
- What are their stated and unstated needs?
- What are their expectations of you?
- What is unclear to you or yet to be explored with your staff?

Understanding your own role transition

- What is your understanding of your current role?
- How is your current role different from your former role? What might you need to change and leave behind?
- What questions do you have about your role?
- What support do you need?

STAGE 2: MAKING THE ROLE

How can you take ownership of your organisation's strategic aims and objectives?

- What role might you (collectively and individually) play in achieving your strategic priorities and aims?

What is the overlap between what you bring to the role and the environmental demands?

- What are your skills, aspirations, feelings?
- What are the expectations and attitudes of others (e.g. your manager, your stakeholders and your staff)?

How can you frame your role in a way that is mindful of cultural and historical contexts, as well as current challenges?

STAGE 3: TAKING THE ROLE

What decisions and actions will you take based on your understanding?

- What will you do? How will you behave?
- Are you authorised to undertake what you envisage?
- Who will you liaise and work with to achieve your goals?
- What will you step away from?

Continuously observing impacts and adjusting your approach.

- What results are being achieved?
- How are people responding to your contributions?
- What culture are you embedding?

According to Quine and Hutton we experience and struggle to make sense of our roles by noticing (in relation to the institution as a whole):

- What is happening to you?
- What you are feeling?
- How people are reacting?
- The impacts and effects of your decisions

Adapted from Quine, C. and Hutton, J. (1992) Finding, Making and Taking The Role of Head The Grubb Institute

COMPETING THE WORKSHEET

You will notice the following worksheet comprises two overlapping circles.

Think about and list in the respective circle:

- A. **Individual Factors:** what you bring to the role - your personal strengths, interests, expertise and passions.
- B. **Systemic Factors:** organisational priorities, emerging needs and opportunities, the industry and commercial context.

On completion of this worksheet have conversation with your manager and discuss the fit between your own skills and interests, and current organisational priorities.

By the end of this conversation you will have a clearer understanding of:

- How each of you views current organisational priorities and needs
- Each of your perspectives on the best application of your experience and skills at the current time
- The authority, delegations and boundaries in which your role will operate
- Who you need to work with in order to achieve key objectives
- What falls outside your role

When completing this worksheet you might want to consider:

- Responsibilities & accountabilities
- Decision making authority and delegations
- Relationships
- Resources
- Support
- Any shifts required in your ways in way of working
- Any anticipated challenges
- What falls outside the role
- Any ideas you want to test
- Any information, permission or authorisation you need to seek?

ROLE ANALYSIS

Use the blank worksheet on the next page to reflect on your role.

Think about:

- A. Individual Factors:** what you bring to the role - your personal strengths, interests and expertise.
- B. Systemic Factors:** organisational priorities, emerging needs and opportunities, the industry and commercial context.



