

**TASK AND SOCIOEMOTIONAL ROLES, LEADERSHIP
AND LEADERSHIP EFFECTIVENESS**

Les Prince

Management Centre, University of Aston

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ABSTRACT

It is frequently asserted, with regard to the early work of R. F. Bales and his colleagues, that: two role specialisms emerge in unstructured groups; that these two roles are typically performed by two different persons and that groups in which such differentiation has occurred are more effective and better satisfied than groups in which it has not occurred. Furthermore, it is generally assumed that the terms used to describe the roles, task and socio-emotional specialist, are conceptually and empirically well articulated. Each of these points is evaluated critically. It is suggested that there has been a general misunderstanding about what Bales was claiming. A framework for placing role differentiation within the context of leadership effectiveness is also outlined.

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TASK AND SOCIOEMOTIONAL ROLES, LEADERSHIP AND LEADERSHIP EFFECTIVENESS

Role differentiation theory, if it can be called a theory, is a general theory about the development of role structure within small face-to-face groups "...which have tasks that require interdependent, co-ordinated activity for their accomplishment." (Burke, 1972:516). Although the terms 'differentiation' and 'role differentiation' are used in a number of distinct ways in the principal sources (see especially Bales, 1958; Bales & Slater, 1955; Slater, 1955¹), primarily the differentiation to which the theory refers is the bifurcation of the more general leadership role into two distinct sub-roles: the task specialist and the socio-emotional specialist², which will be discussed in more detail later on. Conceptually the theory is informed directly by the earlier work of R. F. Bales on the 'equilibrium hypothesis' (e.g. Bales, 1953), a fact which it is important to bear in mind when evaluating what he says.

Broadly stated, the equilibrium hypothesis, which is a species of balance theory, suggests that an effective and efficient group is one that has established or maintained, over time, a balance between its task need fulfilment and its socio-emotional need fulfilment. Basically, the argument is that task activity (that which tends towards goal achievement) creates tensions and uncertainties, and thus imbalance, within the group. There is thus generated a need for social activity to restore equilibrium. Some of this activity may be positive, taking the form of jokes, laughter and so on, but, Bales suggests, there will also be a certain amount of negative affect generated. The successful group is not only able to cope with a moderate amount of positive tension release (too much and the job doesn't get done) but is also able to deflect or transmute such negative affect as there is, and thus protect itself from destructive internal

tendencies (Bales, 1953; Thelen, 1956; Hare, 1976). Thus an important aspect of group interaction is social activity, actual and perceived, as well as task activity, an idea that is familiar from other work in the field (e.g. Bennis & Shepard, 1956; Bion, 1961; Schutz, 1955; Thelen, 1956). Therefore, a successful group is one that achieves an appropriate balance between its levels of task and social activity, and these levels are determined by the task and social needs of the group. Note that this balance need not take the form of a simple numerical equality of task and social inputs, or in Bales' terms I.P.A. acts in the task and social areas³. Conceptually we may suggest that some groups, under some conditions, have, or develop, a large need for social activity, and others have a very small need. Thus we may further suggest a notional weighting of task and social inputs (Slater, 1955) such that the relative numbers of qualitative inputs needed to restore balance will vary from group to group, and will vary within the same group over time and under different conditions.

Given the conceptual separation of task and social activities, Bales quite reasonably goes on to discuss the roles and role behaviours which these imply. But there has been a great deal of confusion about what he was claiming. Nowhere does he suggest that the two types of activity cannot be carried out by a single person, as some commentators claim he does (e.g. Lewis, 1972, 1973; Rees & Segal, 1984). On the contrary, he and his co-workers have on a number of occasions considered it a real possibility that a single person can achieve both, and in essence perform the functions of the two roles more or less single-handed (Bales & Slater, 1953; 1955, 1958; Borgatta & Bales, 1956; Borgatta, Couch & Bales, 1954). However, in view of Bales' stated conviction that the two types of activity are essentially incompatible (Bales, 1958), one should be extremely cautious here, although it is worth considering that being committed to the view that an individual may perform incompatible functions, does not

commit one to the view that they will do so simultaneously.

Although he says very little about it, it is clear that for Bales effective leadership is conceived, as in a successful group, in terms of an appropriate balance between task and social activity. That is to say, effective leadership reflects the needs of the group and symbolises the balance at the group level:

"Leadership is attributed to that member...who best symbolises the weighted combination and integration of the two more specialised functions, i.e. task and social functions." (Bales & Slater, 1955:298).

This point is important to bear in mind; having been consistently overlooked in the literature, it is nonetheless one of the keys to an understanding of role differentiation theory.

Bales claims that the behavioural separation of the leadership role into task and social roles, was a genuine empirical discovery (Bales, 1968, cited in Burke, 1972: 517), and I can see no reason to disbelieve him. Initially he was investigating what he called the 'hypothesis of a single status order', which posited the emergence of a status structure along a single qualitative dimension, that is, perceived leadership. (Bales, 1953: 471; Bales, 1958:439). The perceived leader, in this case, was expected to be rated as having produced the best ideas, to be perceived as the group discussion guide, and be rated as the best liked group member. In fact this expectation was not supported by events; the task specialist turned out not to be best liked.

Returning to the earlier statement of the equilibrium hypothesis, Bales' interpretation of this result was that the best liked person must be engaging in some sort of social activity, that is, making conciliatory gestures, showing solidarity and so on (Bales, 1953: 474). In other words Bales was claiming that the separation of Liking from the other scales was evidence that the leadership role had separated into the two roles of task and social specialist. Note that thus far role differentiation as a phenomenon has been identified on the results of one scale, Liking.

Let me stress the point again that Bales is not claiming that role differentiation, understood as the performance of task and social functions by separate persons, is in some sense an inevitable outcome of group interaction, regardless of the composition and purpose of the group. The equilibrium problem is seen as a general problem to which all groups must find a solution; it may be solved by role differentiation, in the behavioural sense, or it may not. That is to say, he is claiming that the leadership role may often be separated into task and social roles, but not always. However, let me also emphasise that the social specialist, in the conceptual sense, has been identified operationally as the best liked group member. The suggestion Bales makes, and note that this is essentially *ex post facto* speculation, is that social activity attracts liking. It is to this last aspect of the theory, that is the empirical translation of the conceptual proposition as it appears in the work of Bales and his colleagues, that I would now like to turn. For a variety of reasons I will concentrate on the social role, but mainly because its operationalisation in terms of the best liked group member strikes me as one of the weakest areas of role differentiation theory.

The task and social role specialisms were identified on the basis of results from three (originally four) sociometric questions, plus an 'objective' measure of activity based on the number of I.P.A. acts initiated (Bales et al, 1951). The task role was identified from the results of two of the questions asking group members to rank one another on the basis of who

had the best ideas and who did the most to guide the discussion and keep it moving effectively, commonly referred to as 'Ideas' and 'Guidance' for short. The social role was, as already pointed out, identified on the basis of how well liked each group member was; 'Liking' for short. As several commentators (e.g. Burke, 1972; Olmsted, 1959; Wheeler, 1957) have pointed out, the relationship between the conceptualisation of the social specialist as a conciliator and the operationalisation as the best liked person is somewhat remote. Theoretically there are many reasons why a person might be rated as highly liked, besides, and not necessarily connected. with, social activity (Theodorson, 1957).

The question of whether Liking is a valid and sufficient representation of socio-emotional contributions, in the conceptual sense, was raised directly and examined by Burke (1967, 1972). Results from his factor analytic study, which was aimed at tightening the relationship between the conceptualisation and operationalisation of the social specialist, indicate that Liking, of all the socio-emotional items he examined, had the lowest loading on a derived social factor. Furthermore, it was also the social item most strongly associated with a task factor (Burke, 1973:802. See table 1.). This is not to suggest, of course, that Liking will always, and under all conditions, have such a low loading on a social factor, but Burke's results are a clear indication that as a means of identifying a social specialist, in the conceptual sense, it is alone insufficient. That is to say, as the sole operationalisation of the concept 'social specialist', Liking is neither sufficient nor valid. Clearly, therefore, there are problems associated with the identification of the social specialist; it cannot be safely assumed that the best liked group member has made, or has been perceived to have made, the major socio-emotional contribution to the group activity.

Table 1. FACTOR ANALYSIS OF RESPONSES TO POST-SESSION QUESTIONNAIRE: SOCIAL-EMOTIONAL ITEMS.

Adapted from Burke (1967: 384; 1972: 534).

	FACTOR LOADINGS	
	Task	Social
LIKING	.43	.61
MAINTENANCE OF CORDIAL AND FRIENDLY RELATIONS	.40	.83
MAKING TACTFUL COMMENTS	.37	.85

With the possible exception of Burke's work, the same problem of operationalisation may be detected in what few replication attempts there have been (e.g. Gustafson & Harrell, 1970; Rees & Segal, 1984), which raises the question of whether the Bales-Slater theory has been adequately tested empirically; to my mind it hasn't.

There are three main points that I want to underline so far. First of all, the equilibrium problem is seen as a problem confronting all groups. To be effective a group needs to establish or maintain, over time, a balance between its task and social activities in such a way

as to satisfy its task and social needs. Secondly, these two qualitatively different types of activity may, in some circumstances, be carried out by different people, that is, role differentiation along task and social lines may occur, but this is not inevitably the case. There is nothing in Bales' work which suggests that the task and social roles must be filled by different people, in particular by two different people. The third point is simply that empirically the social specialist has been translated into the person rated as best liked in the group. As we have seen this is highly problematic, and the lack of congruence between the conceptual and empirical formulations raises doubts about whether role differentiation theory has been tested.

I would like to conclude with a brief consideration of how leadership, task and social roles, both enacted and perceived, and effectiveness relate to one another. Going back to an earlier point, I have suggested that leadership effectiveness, as with group effectiveness, may be conceived in terms of an appropriate balance of task and social activity as determined by the task and social needs of the group, and that what represents an appropriate balance will, theoretically, vary from group to group.

Using the concept of task activity legitimacy, raised by Verba (1961) and Burke (1972), as an exemplar, we might consider the following situations. It might be that in a group where task activity per se is seen as legitimate, there might be relatively little need for specific social activity, and in cases where it is seen as illegitimate, correspondingly there might be a relatively high need. Thus in the first instance effective leadership would be characterised by a relatively high rate of task activity and low rate of social activity. Where there is a low need for social activity, of course, it is unlikely that anyone could occupy a position as social specialist. In the second instance, where a high need for social activity is generated, then the opportunity clearly presents itself for role specialisation. In this case effective leadership will be characterised by relatively high rates of activity in both task and social areas, and there are at least three possible outcomes. First of all, one person may be able to satisfy group task and social needs single handed. This is what Bales (1958) calls the 'Great Man' (but in recognition of the contemporary Zeitgeist I prefer the term 'Great Person'). Secondly, the task and social activities may be performed by two separate persons; task and social specialists. Here effective leadership may be considered to be performed by the joint activities of the two. However, there is the third possibility to consider, which I have labelled for convenience 'other options'. Actually it represents several possible outcomes, but I will illustrate only one, with the help of a further example.

Consider a situation where task activity is perceived as legitimate, but domination of the proceedings is not, that is, where it is seen as illegitimate for a minority of group members to make the majority of task contributions. Such a situation may be found in groups with a normative climate based on anarchist principles (see e.g. Avrich, 1972a, 1972b; Dolgoff, 1971; Woodcock, 1962, 1977), and is currently quite common amongst what are often called 'social movement' groups. Here, one might suppose, domination attempts would lead to a group level need for social activity (Brown & Hosking, 1984). In this case, not only does task activity need to be perceived as legitimate, but also the manner of its accomplishment. Thus generally we might say that any activity which ruptures normative expectations about appropriate behaviour will create a need for social activity to restore balance⁴. But, assuming that such a group develops a structure consistent with its principles, then the Great Person and role specialist options enumerated above will not be appropriate. Under such circumstances task and social activity may be diffusely spread throughout the group. Assuming that

appropriate levels of each activity are achieved, so as to satisfy the group's task and social needs, then effective leadership can be said to have been accomplished by the joint efforts of the group membership.

Thus the options available for achieving balance between task and social activity, actual and perceived, and thus the ways in which effective leadership may be accomplished, can be grouped under three headings:

- i) effective leadership may be achieved by a single person who is able to satisfy group task and social needs single handed;
- ii) separate task and social specialists may emerge, and in this case effective leadership may be characterised in terms of their joint efforts, that is to say, the role differentiation option;
- iii) task and social activity may be diffusely spread throughout the group, and thus effective leadership accomplished by the joint efforts of the whole group membership (see figure 1).

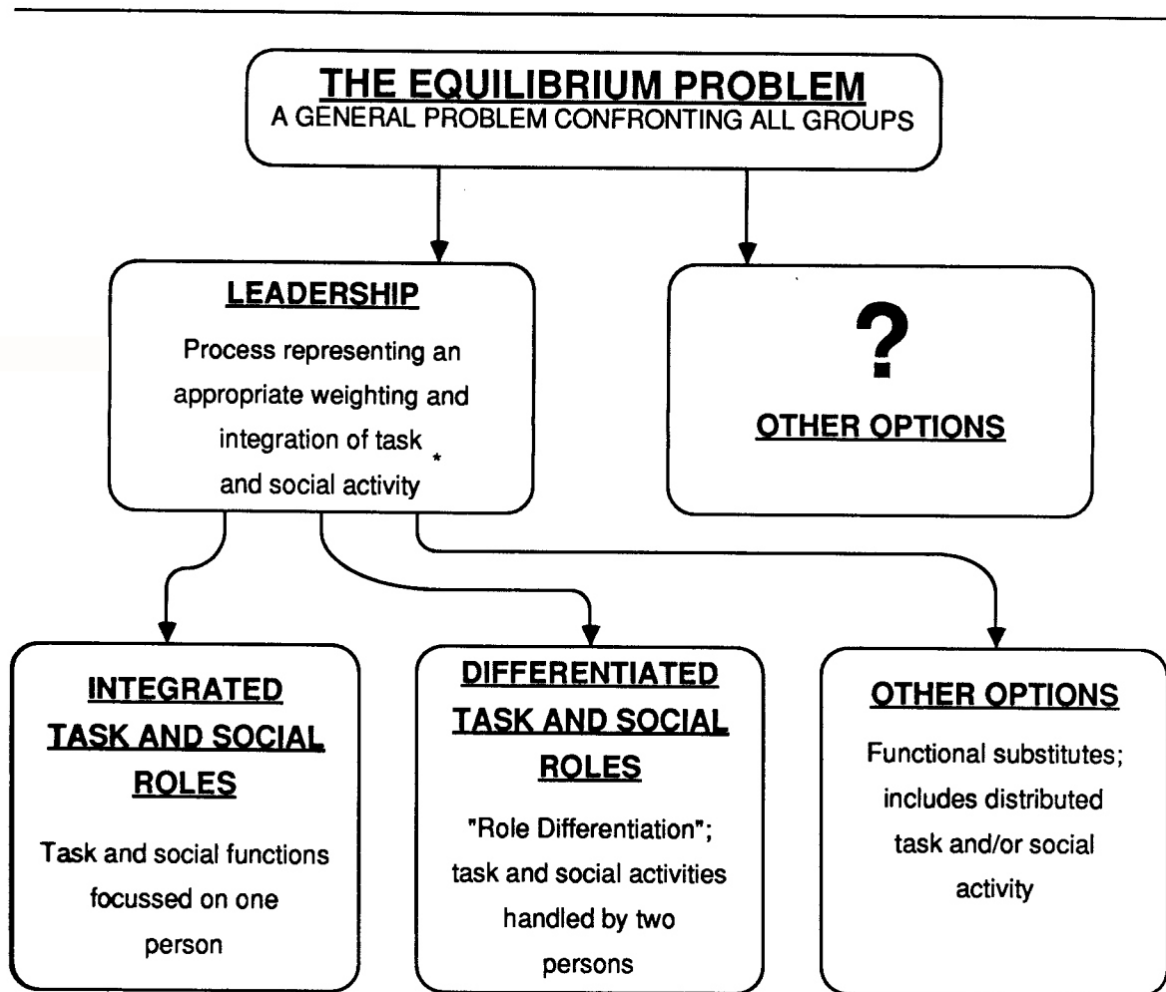
It might be added that the conditions under which a group will take one option rather than the others have yet to be adequately identified.

So, to summarise and conclude. I have tried to show that an appreciation of the equilibrium hypothesis is essential for an understanding of role differentiation theory. I have also tried to show that the conceptual distinction between task and social roles in no way implies that these two roles must be filled by two separate persons. That is, role-differentiation is not inevitable, within the Bales schema; the Equilibrium Problem is thought to be a general problem facing all groups, but role differentiation is only one way of solving it⁵. Partly to demonstrate this, I have considered two other options, both within the context of leadership effectiveness. In the latter case, it has been suggested that effective leadership may be conceived in terms of inappropriate balance between task and social activity, and thus in terms of the performance of task and social emotional behaviours.

In considering the empirical aspects of role differentiation theory, it has been suggested that the relationship between its conceptual presentation and empirical translation is sufficiently vague to raise the question of whether the theory has been adequately tested empirically.

Finally, as things stand at present, the conditions under which role differentiation, in the behavioural sense, might reasonably be expected, and those under which it would not, are unclear. It is my contention that a great deal more conceptual and empirical work needs to be conducted with the aim of tightening up the theory and identifying boundary conditions.

**FIGURE 1: RESOLUTION TO THE EQUILIBRIUM PROBLEM
IN TERMS OF LEADERSHIP AND ROLE-
DIFFERENTIATION.**



* This, of course, is only one aspect of leadership, that is, the aspect pertinent to the Equilibrium Problem. Other aspects of leadership may, of course, be as important, but these are beyond the scope of this paper.

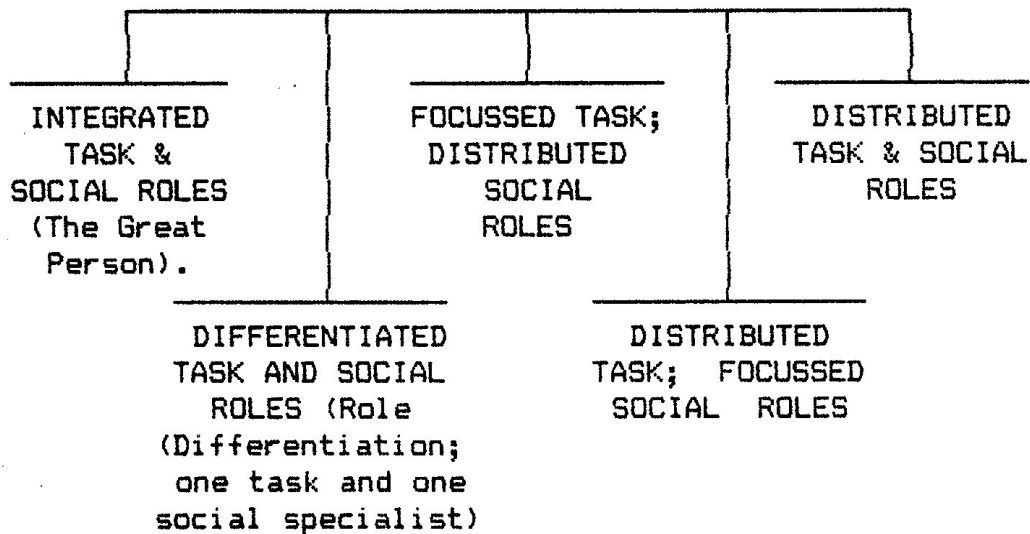
Some theoretical possibilities for group structure in relation to the Equilibrium Problem.

THE EQUILIBRIUM PROBLEM

A general problem confronting all groups; the establishment of dynamic harmony between task and social functional areas.

LEADERSHIP

Process representing an appropriate weighting and integration of task and social-emotional activity.



Adapted from Prince (1986 a).

NOTES

1. Where the terms are sometimes used as synonyms for role emergence.
2. Called variously the socio-emotional specialist, the social-emotional specialist, the emotional-social specialist, the socio-emotional specialist and the social specialist. I will mostly use the last term for brevity.
3. I.P.A. stands for Interaction Process Analysis. See Bales, 1950a, 1950b.
4. Note, however, that even in the absence of recorded social activity we may still conclude that balance has been achieved, so long as certain other conditions are met. A high level of satisfaction is one possible criterion (Heinicke & Bales, 1953). However this presents an added complication which I don't want to consider here. Indeed, Bales himself has considered alternative solutions, such as the 'Great Person' option (Borgatta et al., 1954) and 'scapegoating' (Bales, 1958).

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