Advocate
Make the case for and champion specific causes or communities

Administrator
Move the paper (and the people) through the process

Accountability officer
Keep tabs on financial status and programmatic goals of grantees or projects
Ally

Develop relationships with stakeholders in a spirit of partnership that elevates community expertise and lived experience.

Ambassador

Represent the institution's story, vision, and values to diverse stakeholders, including board and beneficiaries.

Analyst

Evaluate strategies, review proposals and/or outcomes, assessing situations with an objective and dispassionate eye.
Bridge builder
Make it possible for strange or unlikely partners to work together

Boundary setter
Scoping and co-creating projects in a way that aligns with organization's capacities and goals

Bias detector
Help foster equity by identifying systems and processes that perpetuate biases
Community engager
Secure feedback and stakeholder input to improve organization’s strategies and services

Collaborator
Partner with a variety of sector colleagues to achieve shared goals

Closer
Bring deliberations and due diligence to an end to make or secure a grant
Consultant
Provide advice or expert assistance to funders and/or grantees.

Convener
Host inclusive forums, inviting diverse stakeholders to the table to discuss, learn, and co-create solutions.

Critical friend
Give honest, constructive critique without smashing hopes or undermining confidence.
Facilitator
Lead, train, or coordinate the work of a group to get ideas on the table or to get things moving

Disturbance generator
Help colleagues, grantees, and/or stakeholders question assumptions

Decision giver
Provide a clear and timely “no” or “yes” to a grantseeker or colleague
Idea mover
Take a leap with new ideas or people in a field or community to pilot new initiatives

Fundraiser
Develop relationships and strategies to grow donated revenue for an organization or grantee

Fact finder
Collect, analyze, and share quantitative and qualitative data needed to inform decisions
Influencer
Highly networked individual whose knowledge and thought leadership establish new norms and trends

Includer
Ensure no one needed for a task is left out of the work by creating processes that allow for diverse inputs

Impact assessor
Determine whether or not outcomes are worth the investment and how lessons can benefit future work
**Mediator**
Reconcile differences and aid communication between parties

**Matchmaker**
Connect grantees or partners to donors, practitioners, or policymakers where the interest might be mutual

**Knowledge sharer**
Field expert who keeps others abreast of insights, new ideas, and developing trends
**Rule maker**
Define and establish policies and procedures in accordance with organization’s values

**Rescuer**
Manage crisis situations, including saving projects or grants that have floundered or gone astray

**Planner**
Think, organize, and act tactically to get something done
<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sounding board</strong></td>
<td>Actively listen to learn from ideas and opinions representing diverse points of view</td>
</tr>
<tr>
<td><strong>Signal booster</strong></td>
<td>Social media maven, savvy at engaging audiences on all the latest platforms</td>
</tr>
<tr>
<td><strong>Scanner</strong></td>
<td>Gather information from many sources as a prelude to grantmaking or programmatic action</td>
</tr>
</tbody>
</table>
Strategist
Create and sell a long-term plan of action to achieve a particular institutional goal.

Storyteller
Amplify organization’s stories to build the case for connection, collaboration, and support.

Streamliner
Steward resources responsibly by developing more efficient back-office processes.
Translator
Help diverse internal and external stakeholders understand one another’s needs, priorities, and operating contexts

Team captain
Recruit, retain, develop, and motivate the talent necessary to make it all go

Talent scout
Keep an ear to the ground via inclusive channels to learn who’s doing what (and well) in a field or community
Validator
Affirm good work by grantees, partners, and/or others in the field

Voice amplifier
Find and support people at the margins of a field or community

Wild card
Invent a role to suit the situation
Wild card

Invent a role to suit the situation
Activity 1
What’s missing?
(for program staff)
- Jot down tasks you do most frequently during the day, week, or year.
- Now check the cards. Which roles are important for getting those tasks done?
- What’s missing? Make a list of any cards you would add.

Activity 2
What’s essential?
(for program staff)
- Sort the cards for the six most essential roles to being effective on the job.
- Look for commonalities and differences.
- Which roles are least common? What makes them essential for some but not others?

Activity 3
Too much, too little
(for more experienced program staff)
- Choose the cards that represent what you do too much of and what you don’t do enough of.
- What would it take to change the balance?

Activity 4
Lessons learned
(for a mixed group of new and more experienced program staff)
- Invite experienced participants to pick a card and tell a story about a lesson learned in that role.
- Organize people into “fishbowls” by forming circles around people holding the same card. Ask them to compare notes on what they learned from each other’s stories; the rest of the group can listen in and comment.

Activity 5
What roles do we value?
(for an all-staff meeting or with trustees)
- Display or read the cards, then invite discussion.
- What are the most common roles inside our organization? What are the least common?
- Are there roles that are not acceptable inside our organization? Why?
Activity 6
Telling trustees
(for staff and trustees)

☐ At a retreat or another appropriate setting, give board members the cards.

☐ Ask each trustee to choose a few roles they'd like to hear more about and say why.

☐ Invite staff to tell stories about successes and challenges while in those roles.

☐ Or, ask staff members to pair up with trustees to tell stories that explore their favorite and/or most challenging roles.

☐ Accountability officer
☐ Administrator
☐ Advocate
☐ Ally
☐ Ambassador
☐ Analyst
☐ Bias detector
☐ Boundary setter
☐ Bridge builder
☐ Closer
☐ Collaborator
☐ Community engager
☐ Consultant
☐ Convener
☐ Critical friend
☐ Fact finder
☐ Decision giver
☐ Disturbance generator
☐ Facilitator
☐ Fundraiser
☐ Idea mover

☐ Impact assessor
☐ Includer
☐ Influencer
☐ Knowledge sharer
☐ Matchmaker
☐ Mediator
☐ Planner
☐ Rescuer
☐ Rule maker
☐ Scanner
☐ Signal booster
☐ Sounding board
☐ Strategist
☐ Storyteller
☐ Streamliner
☐ Talent scout
☐ Team captain
☐ Translator
☐ Validator
☐ Voice amplifier
☐ Wild card

Roles@Work

How do I shape my professional role both inside my institution as well as externally? How do I manage the different roles I need to play? These are questions every professional asks.

Candid's Roles@Work cards are designed to help you explore these questions more intentionally. The role cards are based on stories from funders and nonprofits in all kinds of organizations.

We invite you to experiment with the Roles@Work cards. Use our suggested activities or make up something that works for your group. If you use the cards, let us know how it goes! We're always improving products based on your feedback as well as sharing case examples via our blog.

Candid.