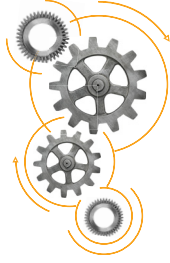


Candid.

Advocate

Make the case for and champion specific causes or communities

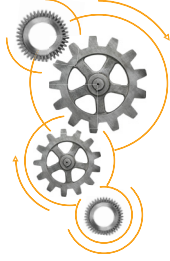


Roles@Work

Candid.

Administrator

Move the paper (and the people) through the process



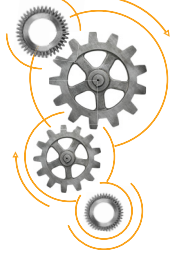
Roles@Work

Candid.

Accountability

Officer

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

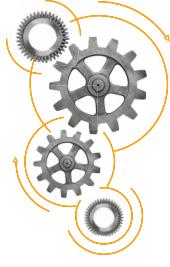


Roles@Work

Candid.

Analyst

Evaluate strategies, review proposals and/or outcomes, assessing situations with an objective and dispassionate eye

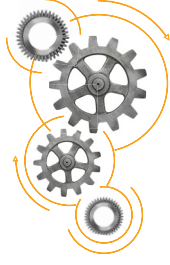


Roles@Work

Candid.

Ambassador

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

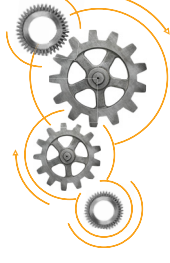


Roles@Work

Candid.

Ally

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

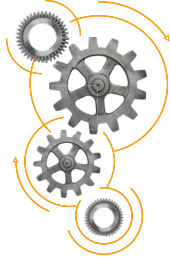


Roles@Work

Candid.

Bridge builder

Make it possible for strange or unlikely partners to work together

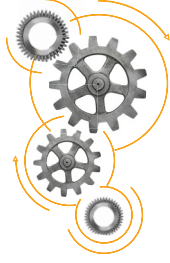


Roles@Work

Candid.

Boundary setter

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

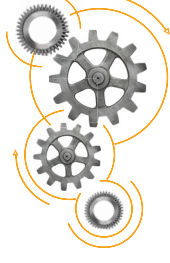


Roles@Work

Candid.

Bias detector

Help foster equity by identifying systems and processes that perpetuate biases

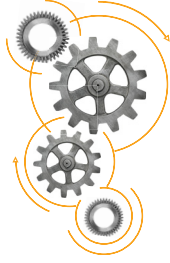


Roles@Work

Candid.

Community engager

Secure feedback and stakeholder input to improve organization's strategies and services

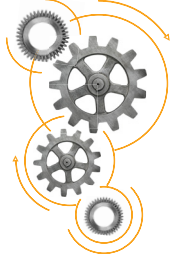


Roles@Work

Candid.

Collaborator

Partner with a variety of sector colleagues to achieve shared goals

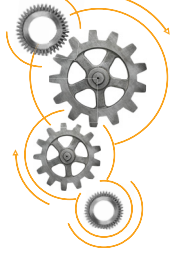


Roles@Work

Candid.

Closer

Bring deliberations and due diligence to an end to make or secure a grant

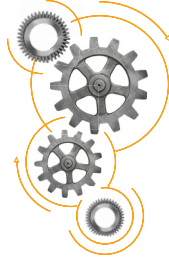


Roles@Work

Candid.

Critical friend

Give honest, constructive critique without smashing hopes or undermining confidence

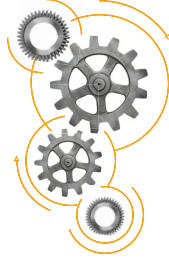


Roles@Work

Candid.

Convener

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

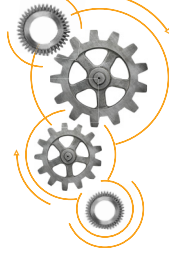


Roles@Work

Candid.

Consultant

Provide advice or expert assistance to funders and/or grantees

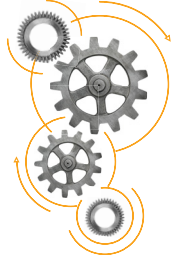


Roles@Work

Candid.

Facilitator

Lead, train, or coordinate the work of a group to get ideas on the table or to get things moving

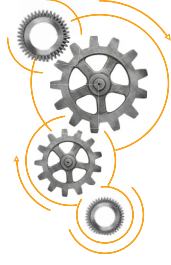


Roles@Work

Candid.

Disturbance generator

Help colleagues, grantees, and/or stakeholders question assumptions

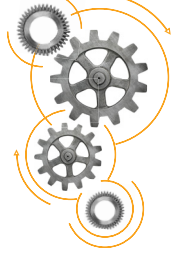


Roles@Work

Candid.

Decision giver

Provide a clear and timely “no” or “yes” to a grantseeker or colleague

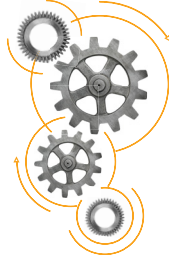


Roles@Work

Candid.

Idea mover

Take a leap with new ideas or people in a field or community to pilot new initiatives

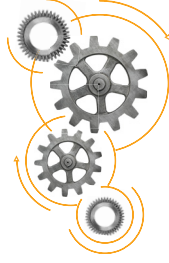


Roles@Work

Candid.

Fundraiser

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

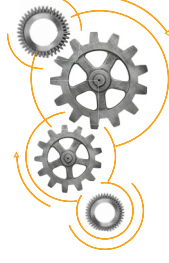


Roles@Work

Candid.

Fact finder

Collect, analyze, and share quantitative and qualitative data needed to inform decisions

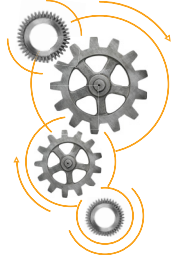


Roles@Work

Candid.

Influencer

Highly networked individual whose knowledge and thought leadership establish new norms and trends

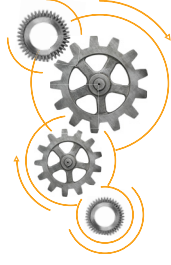


Roles@Work

Candid.

Includer

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

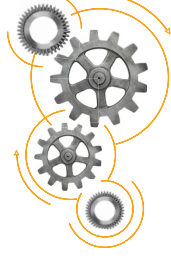


Roles@Work

Candid.

Impact assessor

Determine whether or not outcomes are worth the investment and how lessons can benefit future work

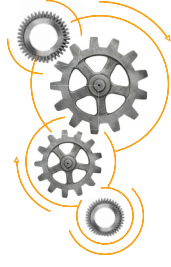


Roles@Work

Candid.

Mediator

Reconcile differences and aid communication between parties

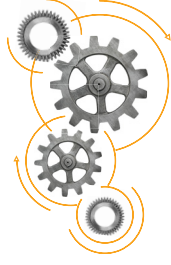


Roles@Work

Candid.

Matchmaker

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

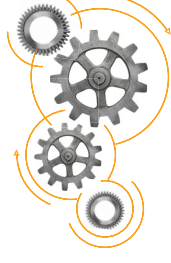


Roles@Work

Candid.

Knowledge sharer

Field expert who keeps others abreast of insights, new ideas, and developing trends

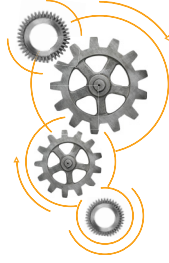


Roles@Work

Candid.

Rule maker

Define and establish policies and procedures in accordance with organization's values

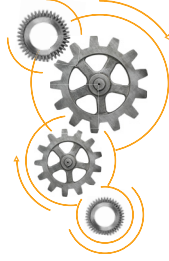


Roles@Work

Candid.

Rescuer

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

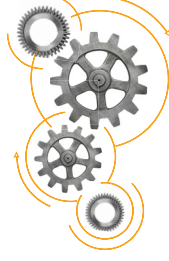


Roles@Work

Candid.

Planner

Think, organize, and act tactically to get something done

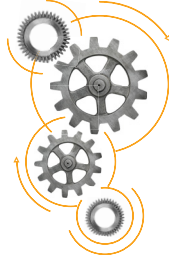


Roles@Work

Candid.

Sounding board

Actively listen to learn from ideas and opinions representing diverse points of view

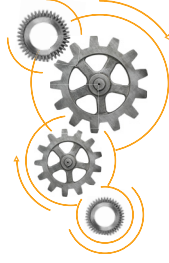


Roles@Work

Candid.

Signal booster

Social media maven, savvy at engaging audiences on all the latest platforms

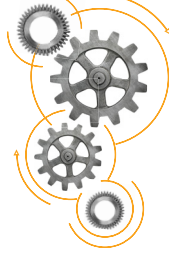


Roles@Work

Candid.

Scanner

Gather information from many sources as a prelude to grantmaking or programmatic action

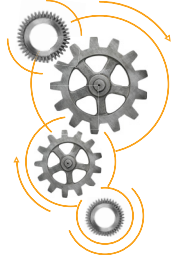


Roles@Work

Candid.

Streamliner

Steward resources responsibly by developing more efficient back-office processes

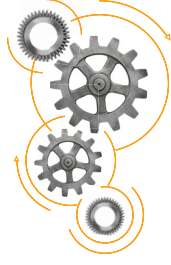


Roles@Work

Candid.

Storyteller

Amplify organization's stories to build the case for connection, collaboration, and support

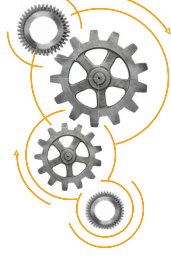


Roles@Work

Candid.

Strategist

Create and sell a long-term plan of action to achieve a particular institutional goal

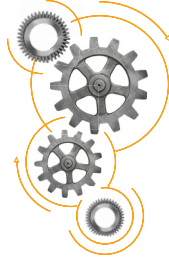


Roles@Work

Candid.

Translator

Help diverse internal and external stakeholders understand one another's needs, priorities, and operating contexts

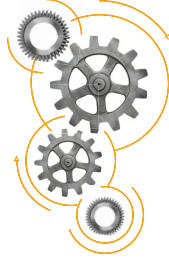


Roles@Work

Candid.

Team captain

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

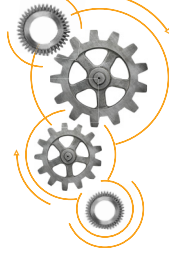


Roles@Work

Candid.

Talent scout

Keep an ear to the ground via inclusive channels to learn who's doing what (and well) in a field or community

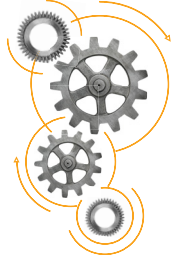


Roles@Work

Candid.

Wild card

Invent a role to suit the situation

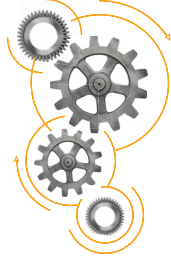


Roles@Work

Candid.

Voice amplifier

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

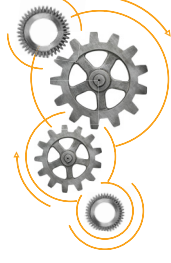


Roles@Work

Candid.

Validator

Affirm good work by grantees, partners, and/or others in the field

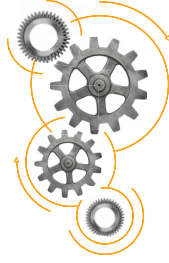


Roles@Work

Candid.

Wild card

Invent a role to suit the situation

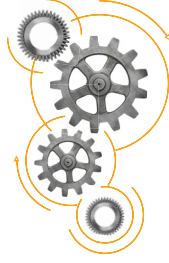


Roles@Work

Candid.

Wild card

Invent a role to suit the situation

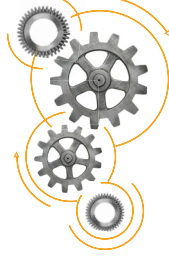


Roles@Work

Candid.

Wild card

Invent a role to suit the situation



Roles@Work

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.

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.

- | | |
|---|---|
| <input type="checkbox"/> Accountability officer | <input type="checkbox"/> Impact assessor |
| <input type="checkbox"/> Administrator | <input type="checkbox"/> Includer |
| <input type="checkbox"/> Advocate | <input type="checkbox"/> Influencer |
| <input type="checkbox"/> Ally | <input type="checkbox"/> Knowledge sharer |
| <input type="checkbox"/> Ambassador | <input type="checkbox"/> Matchmaker |
| <input type="checkbox"/> Analyst | <input type="checkbox"/> Mediator |
| <input type="checkbox"/> Bias detector | <input type="checkbox"/> Planner |
| <input type="checkbox"/> Boundary setter | <input type="checkbox"/> Rescuer |
| <input type="checkbox"/> Bridge builder | <input type="checkbox"/> Rule maker |
| <input type="checkbox"/> Closer | <input type="checkbox"/> Scanner |
| <input type="checkbox"/> Collaborator | <input type="checkbox"/> Signal booster |
| <input type="checkbox"/> Community engager | <input type="checkbox"/> Sounding board |
| <input type="checkbox"/> Consultant | <input type="checkbox"/> Strategist |
| <input type="checkbox"/> Convener | <input type="checkbox"/> Storyteller |
| <input type="checkbox"/> Critical friend | <input type="checkbox"/> Streamliner |
| <input type="checkbox"/> Fact finder | <input type="checkbox"/> Talent scout |
| <input type="checkbox"/> Decision giver | <input type="checkbox"/> Team captain |
| <input type="checkbox"/> Disturbance generator | <input type="checkbox"/> Translator |
| <input type="checkbox"/> Facilitator | <input type="checkbox"/> Validator |
| <input type="checkbox"/> Fundraiser | <input type="checkbox"/> Voice amplifier |
| <input type="checkbox"/> Idea mover | <input type="checkbox"/> Wild card |

Candid.