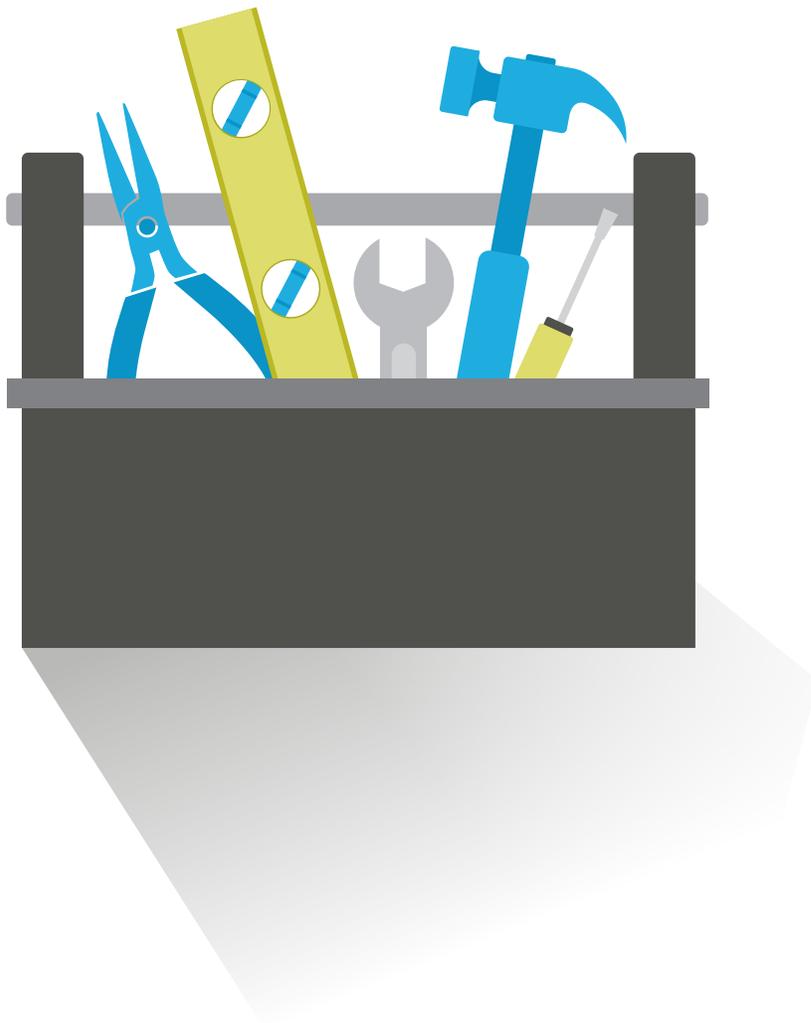


Discover Your Role

Bring What's Needed to Each Situation



Philanthropy's
Reflective Practices:
a project to help you
build what you bring
to your work

What do we mean by role? Think of roles as the behaviors you expect of yourself in any given situation. Your roles are the empty space in your job description—all the things that need to be done but can't be codified.

If you are like many professionals in a helping field, the idea of “being in role” might evoke an image of a wooden bureaucrat. Before you dismiss the power of situational roles, think like a sociologist for a moment. Your role is not only about your position. Regardless of your title, there are multiple behaviors—many not described anywhere—that you expect of yourself and that others expect of you in any situation. **You may need to be a listener, an amplifier, a boundary setter, a convener, a disturbance generator, etc.** You are always adjusting roles to be effective in a situation while keeping in mind your role in the larger system. (Think about cocreating a proposal with a potential grantee.) You are often in multiple roles at the same time. (Think about getting a text from a family member who needs a ride during a critical meeting about a program strategy.) We move in and out of situational roles all the time without naming them.

When we are under pressure, we often forget to be intentional about our choice of roles. This requires a pause and a step back to view the whole situation and figure out what is needed in that moment to help the individual, group and/or outcome move forward. Let's say you are the program officer leading a strategy review team meeting. Do you need feedback from everyone about this draft of the strategy because the next version goes up the chain and you don't want sleepy nods here and critique later? Is it time for competing ideas to be aired or time to move forward on long-vetted options? It may be a little of all those things. You need to find the role that matches the needs of the moment. Advocate? Analyst? Consensus Builder? Deal Closer?

Don't keep your role insights to yourself. Voicing your role in a situation often avoids confusion. Your partner or colleague may help amplify what's needed or will just appreciate your transparency. And of course they are constructing their role, too. It can be a moment of authentic exchange that can help build trust and advance the conversation.

Be Aware of Role Strain and Role Ambiguity

Most challenging situations require roles that contain creative tensions, where you are pulled in different but equally compelling directions. For example, program officers often report that they feel like they need to be advocates and analysts of proposals at the same time. This is a case of “role strain.” Each role is important, but they require opposing behaviors. You have to make sense of how to modulate between the roles to fit the context.

Many philanthropic roles are complex and therefore freighted with strains and ambiguity. Back to our earlier example: you may be well-known in a variety of ways in a community or a field, but when you are reviewing a proposal or joining a collaborative, you are representing your organization’s needs. A good example of ambiguity is your role during site visits. Is it clear to you and have you been explicit about it with the applicant or grantee? Role strain and role ambiguity are usually not problems to solve but rather tensions to manage. It helps in these situations to observe and name the strains or ambiguities for yourself and invite your partners to notice what they are experiencing as well.

David Wertheimer, director of community and civic engagement at the Bill & Melinda Gates Foundation, gives us an example of classic role strain tied to starting up program strategies. In a blog at *Philanthropy’s Reflective Practices*,¹ he comments on how foundation pressure to meet payout and reach impact in the short term can compete with the vital work of relationship building and joint strategy buy-in.

“ True systems change work isn’t a sprint, but a marathon. If we move too quickly at the start, our pace is unsustainable and we’ll be exhausted before the end of the race. Don’t start the race until your partners are ready to join you.” —David Wertheimer

We hear about role strain and role ambiguity from leaders of color in philanthropy, who often perceive that they are expected to represent a particular group or be an expert on issues of equity because of their own racial or ethnic background or lived experience. Several practitioners commented that this can feel burdensome and exhausting, as they may not want to be in the role of educating others or representing an entire group based on identity in every action they take. Others say that putting identity on the table makes it easier to advocate, but one has to manage feelings of being put in a box, or being reduced to one dimension of one’s identity, or sometimes, facing one’s own skill deficits.

1. reflectivepractices.org.

Shona Carter, a senior program officer at the Community Foundation for Southwest Washington, comments, “I am a black woman now working in a fairly homogeneous community. It’s not that I don’t understand or lead on equity issues: I do, and I care deeply about them. But prior to moving here, I have never had to have conversations with people who didn’t understand why issues of equity matter. I felt like I needed to be the expert to prove myself, but I really didn’t have a nuanced understanding of how to engage in these conversations. I sought out a colleague—another person of color—who encouraged me to lean into the conversations while admitting that I didn’t have the answers and I was learning how to talk about equity in a new context and region. At the same time, I’ve been clear with my colleagues that I don’t want to be the only person leading on equity.”

Know What to Bring and What to Leave Behind

Here is the paradox: While interactions can feel deeply personal, they are always role to role. Back to our earlier example, you may have a longtime relationship with a grantee as a close colleague. When your colleague is presenting a proposal and you are reviewing it, you are both in important roles to get the work done. You are representing the funder and she is representing her organization. But that doesn’t mean you default to wooden, bureaucratic behavior because you are in these roles.

We asked Katie Hong, director of homelessness programs at the Raikes Foundation, how she manages the creative tension of being in role while staying authentic and true to who she is. “You have to understand what role you are playing in any given system as this is important to advancing change. At the same time, every individual, no matter what part of the system you are in, is powerful, and how you show up in the world is a choice. That is, you have the power to either cast a light or a shadow on the people around you.”

What you bring to a role—good and bad—is what will determine how effective you can be. This means mobilizing not only your technical strengths but what you’ve learned from your own life experiences. And it includes managing your weaknesses (often the flipside of your professional and personal strengths) so they don’t interfere with you when in role.

“ Growing up, I thought leadership and power came from institutional power and influence and it was all about ‘hard skills’ like strategic thinking and having a positional authority. Nobody ever told me that it was also an internal journey, doing the hard work of inner reflection and awareness so necessary if you want to positively effect change and transform the world.” —Katie Hong

We always have a choice about how we want to relate to any role or situation. It's not the role that should define us; it's our choice to define the role. However, we often have automatic reactions to roles that come from our conscious and unconscious associations to them. If these reactions are left unexplored, we are no longer in the driver's seat. For example, loving a particular role may mean you overidentify with it and your brain tells you to match that role to tasks when it might not be the right way to go. Avoiding a role because it is uncomfortable for you to take up means you are not using all the tools at your disposal to handle a particular situation and get to the best outcome. We're in our most effective zone when we know our strengths and weaknesses and can mobilize and manage ourselves in all the roles necessary to get the work done.

Darren Walker, president of the Ford Foundation, talks about the challenge of staying aware of the self and role when working on a team, especially as the positional leader. "I'm aware that I'm drawn to generating ideas and making them happen. That's not a bad thing! If something looks like it is really transformative and we have the resources, I want to make it happen. That is both my strength and weakness. I've had to learn to be more consultative than decisive when I'm in a generative situation. Before agreeing to the next step, I try to pause and say, let me talk to people internally, get their sense of this."

Three Good Questions to Ask About Role

1. What are we trying to accomplish and what is the context?
2. What's my role given the situation and the context? What about role strain or role ambiguities?
3. In what ways am I comfortable being in this role? In what ways do I find this role hard? How do I want to identify with my role? How can I make that happen?

Why This Project?

In philanthropy, you have two big jobs.

Your **first job** is to build deep knowledge about the *what* of the work that you are supporting. You stay current with new knowledge, find networks for ongoing learning, and grow your expertise.

Your **second job** is to put that expertise into play—the *how* of the work:

- How do you nurture generative thinking amid complicated group dynamics and power differentials?
- How do you keep learning alive among colleagues and partners?
- How do you strategize with others when there is no right answer to guide you?
- How do you contribute to the work of diversity, equity and inclusion in your organization or in a field?

Philanthropy's Reflective Practices can help you build what you bring to your second job.

Our goal is to learn and share the tools and skills used by practitioners in philanthropy to improve how they work and get to better outcomes in challenging situations.

PRP Briefs can help you start talking about the “how” of philanthropic work with colleagues, board members and partners. Each brief includes relevant examples, useful frameworks and an exercise that you can use with your team or partner to build what you bring to the work.

Want to Learn More?

Read our recent guide, browse posts from philanthropy colleagues or download the other briefs at www.reflectivepractices.org. Sign up to receive new material as it comes online. Want to build reflective practices inside your organization? Contact Jan Jaffe, project leader for Philanthropy's Reflective Practices (jan@reflectivepractices.org).