

Carlton Turner
Executive Director

Partnerships

CultureWorks – Alternate ROOTS worked with Ashley Milburn and Denise Johnson over the past two years to create space in Baltimore, MD for ROOTS Fest 2011 to take place. On September 10, Bob Leonard, Ashley, Denise, myself and outside facilitator Wendi O’Neal met to begin the creation of a memorandum of agreement to define the scope of our ongoing partnership.

Young Activist Leaders Cohort - a partnership with Alternate ROOTS, Roadside Theater and the Forward Thinking Museum. This partnership produced a group of eight young activist leaders that have been convening virtually since May and in-person at ROOTS Fest 2011. This group is working together to develop an analysis of the present historical moment as it relates to movements for social justice and how those movements connect to cultural equity.

Zora Neale Hurston Festival of the Arts and Humanities (ZORA! Festival) – Alternate ROOTS member Don Harrell reached out to the organization to support in the planning of ZORA! Festival. The festival is part of the celebration of the historic community of Eatonville, FL, the oldest African American incorporated city in the country. There is a specific interest in bringing in a hip-hop element to their education day this year. I am participating on the planning committee along with Don Harrell, NY Nathiri, and Tony Major.

Hemispheric Institute for Performance and Politics – Alternate ROOTS recently received dedicate funding from the Ford Foundation to support a group to attend the 8th Encuentro: Cities | Bodies | Action. This event will take in Mexico City in March 2012.

(From the website) The 8th Encuentro of the Hemispheric Institute seeks to examine the broad intersections between urban space, performance and political/artistic action in the Americas. From the critical poetics of body art to the occupation of public space by social movements, the event invites participants to explore the borders, identities and practices through which subjectivities, hegemonies and counter-hegemonies are constructed in the spaces of the city and beyond. We are particularly interested in the ways in which bodies both interpellate and are interpellated, mobilize and are mobilized, by and around the diverse and complex "passions" that are so defining of our globalized and mediatized present—fear, hatred, disenchantment, hope and faith, among others. We seek to investigate, collectively, the strategies through which bodies (individual, social and political) make themselves present and intervene aesthetic conventions, social formations and political structures in their search to create new meanings and new modes of sociality. This theme will be the point of departure for a vast array of performances, exhibits, roundtables, workshops, lectures and work groups.

The Association of American Cultures -

NALAC / FPF Consortium – Alternate ROOTS has been developing relationships with the National Association of Latino Arts and Culture and First People’s Fund, first through the Ford Foundation’s New Works Cohort and then through the Kennedy Center Capacity Building Program. Through our conversations and shared experiences we have come to all agree that our organizations need each other in order to move the field towards cultural equity. Because of our collective work with the Kennedy Center we cemented our understanding that there are very different needs for our constituents than are being met by the current national institutions. To

work on these needs our three organizations have taken up the mantle of providing opportunities for our constituents to engage in capacity building steeped in our own cultural traditions. To this end we have submitted an NEA consortium proposal to support three gatherings over the course of the next two years to engage our collective members. In addition our organizations will conduct cross-training sessions to learn more about our partners' processes and programs.

Conferences

As with most years, I spent quite a bit of time on the road representing Alternate ROOTS at various events and conferences. Here is a quick snapshot of those things I have been involved in since the last Annual Meeting and those things yet to come this year.

September 2010

Imagining America | Seattle, WA (Presenter)
Performing Arts Exchange | Pittsburgh, PA

October 2010

NET Microfest | Atlanta, GA
Grantmakers in the Arts | Chicago, IL (Presenter)
Alliance of Artist Communities | Providence, RI

December 2010

National Performance Network | Dallas, TX

January 2011

APAP | New York City

February 2011

Folk Alliance Conference | Memphis, TN (Presenter)

September 2011

ZAPP Conference | Atlanta, GA (Presenter)
Creative Summit | New York City (Presenter)

October 2011

Grantmakers in the Arts | San Francisco (Presenter)
Neighborhood Funders Group | Albuquerque, NM (Presenter)

November 2011

Policy Link | Detroit, MI

December 2011

National Performance Network | Tampa, FL

Boards, Panels & Committees

There have been many invitations for Alternate ROOTS to participate as part of planning teams, advisory committees, and boards. Here is a list of both completed events and ongoing responsibilities.

Theatre Communications Group Panel (Future Audiences / Future Leaders Programs)
We Shall Overcome Fund Advisory Committee (ongoing)
APAP Conference Planning Committee
Appalshop Executive Committee (Board) (ongoing)
Ford Foundation Networks Cohort
National Endowment for the Arts (SPPA Working Group)
Art & Social Justice Retreat (ongoing)
Network of Ensemble Theaters' Theatre of Place Advisory Group (new)

NALAC Leadership Institute (Observer)

Organizational / Professional Development

Kennedy Center Capacity Building

Over the past 18 months Alternate ROOTS has been participants in the Kennedy Center Diverse Arts Spaces Capacity Building Program along with 9 other organizations. This program has been geared towards presenting organizations that are managing spaces. Alternate ROOTS was one of three network/service organizations participating (NALAC and FPF). The facilitators for this training program all come from the Kennedy Center for the Performing Arts and follow a course designed by Michael Kaiser for the DeVos Institute for Arts Management.

In July Michael Kaiser visited the ROOTS office to do an organizational consultation for Alternate ROOTS. On October 4 & 5 this group will meet in New Orleans for the last time as part of this program. One of the most valuable outcomes of this work has been the deepening of the relationship with peer organizations NALAC and First People's Fund.

Chief Executive Officer Program

Beginning in in the fall of 2011 and ending in late 2013, this program will engage leaders from a range of disciplines in the US and abroad in the big questions that preoccupy us all: competition, relevance, and investment in our work. The Chief Executive Program will create a leadership community to reframe issues and develop new opportunities for individual institutions and create meaningful models for the field at large; and helping a set of outstanding individuals re-imagine what cultural institutions will be and how they can contribute to civil society.

The program will:

- feature three in-person convenings on the intractable issues facing the field – competition, money and relevance – at three of the top business schools in the country
- establish a \$250,000 fund for change and allow participants to propose projects, collaborate and directly invest in the projects that grow out of the program create a problem-solving network with the premier leaders across the entire cultural field
- help with change management challenges through peer and professional resources
- give voice to your ideas and bring attention to your work and your institution through NAS' communication activities
- allow you breathing room for reflection, reframing and creative thinking

Each leader who participates must commit to:

- attend three issue-based educational events – approximately four days every six months
- experiment and lead change in an organization or community
- work with NAS to extract lessons to share with the broader cultural sector
- update the program community on progress of the projects that arise from the program
- cover travel costs to the three in-person event
- have the support of the organization's senior team and board chair

Shannon TurnerManager of Programs and Services

Annual Meeting 2010

[from Patton White] The Alternate ROOTS 34th Annual Meeting took place at Lutheridge Conference and Retreat Center in Arden, North Carolina, from August 10-15, 2010. This five day meeting and artists' retreat is an annual program of Alternate ROOTS, and for many members serves as the core program around which their involvement with the organization rests. Returning to this same retreat center for the 7th consecutive year, the Annual Meeting has found a certain sense of place at Lutheridge.

The 34th Annual Meeting was filled with numerous performances, studios, business meetings and great food. Many new scheduling changes were implemented to see if the attendance at business meetings would be impacted. A new way of presenting the food to the attendees shifted the way that breakfast has been offered in the past, and ushered in a new era of the 'brunch'.

- 216 people registered in a variety of categories
- 3 Artability scholarship recipients
- 21 office and meeting staff members
- 47 regular registrations
- 9 partners
- 32 performers
- 28 studio leaders
- 68 subsidized registrants

Annual Meeting 2012

We are very excited to have so much lead time to plan the next Annual Meeting, having our dates and location locked in a full 12 months in advance. New opportunities and processes have been cultivated, including a new organization of coordinator responsibilities and a competition/call for poster art. Although we are excited to be returning to Lutheridge, especially because they are undergoing a number of renovations with us in mind, it should be noted that the rent is going to step up over the course of the next few years, which will likely affect the participant's registration cost.

Artistic Assistance 2010-11

Artistic Assistance has grown substantially in the last few years, not only in terms of how much money we have to give out, but also in the numbers and diversity of those applying. A streamlined on-line application process has helped give the program more access. Additionally, on the website, a growing archive of final reports from participants can be found.

Total # of cycles: 4

Total dollars spent: \$29,605

Total dollars requested: \$33,915

Total number of grants: 36

Total number of recipients: 35

Recipient Demographics:

- 9 African-American, 5 Latino, 16 White, 5 Mixed Race/Additional
- 25 Female, 10 Male

Tour & Residency Program

In 2010 Alternate ROOTS received program specific funding through a multi-year grant from the Ford Foundation to support artist fees in association with their Diverse Arts Spaces program. In year one Alternate ROOTS supported the presentation of 9 artists through the Tour & Residency Program. This funding is intended to support the larger Diverse Arts Spaces program and not just to fund the program as it has traditionally existed within ROOTS. This pool of funding, although still to support ROOTS artists, is now available to organizations outside of the ROOTS service region (14 states and DC).

As part of the strategic planning process Alternate ROOTS will reimagine how this funding can best support the ROOTS mission. To help make the necessary programmatic adjustments Alternate ROOTS is working closely with NPN (also part of the Ford funding program initiative.)

Publications

The newsletter has come out on a consistent monthly schedule (the Wednesday that's closest to the 15th at noon) for two years and has received high praise from a number of our peers for its organization, design, and useful content.

The website continues to serve many needs, including information sharing, Artistic Assistance applications, and e-commerce (donations, memberships, etc.). We are aware of the ongoing difficulties with on-line event registrations and have compiled a thorough review of the issue for our technologists in hopes that a new/smoothier events system can be implemented before AM 2012.

For two years in a row, we have produced an annual report online for our membership, funders, and the general public.

Membership

The **membership development innovation ensemble** met several times from fall 2010 into late spring 2011. Topics of their work included an evaluation of our membership benefits, discussion of new membership publications/pamphlets, and how the Festival would be utilized as a tool for member recruitment. The group also created the new voting member online application tool.

As expected, the Festival brought in a huge infusion of introductory members – nearly 100 between April and July – but it remains to be seen how many of those folks will transition into voting membership. Remembering that we're just a little over 2 years out from our website/database reboot, we have 352 voting, satellite, and introductory members on the books. Some simple statistics on those members include:

Membership Type

- 172 introductory members
- 144 voting members
- 36 satellite members

Race/Ethnicity

74	143	20	5	1	109
Black/African American/ African decent	White/European American/ European descent	Latino/ Latina/ Hispanic	Asian American/Pacific Islander/South or Southeast Asian	Arab/Arab American	No Answer/ Write In/ Additional

Gender/Sexuality

50 identified as gay/lesbian/by/queer/transgendered, 125 said they did not identify that way, 177 did not answer.

Artistic Discipline

Arts Administration	73
Cultural Organizer	63
Theater	83
Dance	42
Performance Art	68
Movement	38
Music	53
Spoken Word	34
Hip Hop	15
Vaudeville	9
Writer	62
Visual Art	51
Film / Video	30
New Media	19
Presenter	23
Multidisciplinary	65
Appreciative Audience Member	58
Teacher	64

One thing of note from these statistics is that, when this question was answered, rarely did the member identify as a practitioner of only one discipline.

Interns

In 2011, the ROOTS staff hosted 4 interns from a variety of institutions, including SCAD Atlanta and GSU. 3 of the interns worked in the office and supported the Festival; 1 worked with Keryl

on development tasks. We already have 2 interns who've applied to come to work with us in 2012, one from Louisiana, and one from Virginia Tech.

Trey Hartt
RSC Coordinator

LEADERSHIP

Omari Fox has been the 2011 RSC Chair. We introduced a new contracted Coordinator position that, at the beginning of the year, was held by Mat Schwarzman and is currently held by Trey Hartt.

Currently, RSC will be without a specified Coordinator between October 1 and the end of the year but Carlton and Omari Fox will help make sure the program stays on task.

BY THE NUMBERS...

- 4 RSC Learning Exchanges:
In the People's Hands, Durham, NC
National Learning Exchange, Baltimore, MD
Clear Creek Festival, Clear Creek, KY
Cucalorus Film Festival, Wilmington, NC
- 55 Members
8 New Members
18 Facilitators
8 Shadows
- 2 RSC Retreats
October (Baltimore, MD)
November 2011 (Atlanta, GA)

SPECIAL PROJECTS/RELATIONSHIPS

Apart from Learning Exchanges, RSC engaged a process of developing a Curriculum Book (tentative title) that will highlight multiple Learning Exchanges and other ROOTS events from the past 3-5 years in order to promote the Principles of Community Engagement and community-based art practices within RSC and ROOTS. This process is contingent upon funding but a 2012 budget will be presented to ExComm at this year's annual meeting. We also have been continually developing our relationship with CultureWorks in Baltimore, MD.

RETREATS

The RSC Innovation Ensemble met once in March and plan to meet again in late fall/early winter. The March retreat focused on planning for the National Learning Exchange, beginning the visioning process for the program, and continued progress with the Curriculum Project. The upcoming fall/winter retreat will focus much on planning and implementation of a plan RSC will follow for the next 3-5 years that is aligned with the overall ROOTS strategic plan.

MEMBERSHIP

RSC Membership has been a "hot button" issue among RSC members. How do you define an RSC member? Do you have to be an RSC Member to be an RSC Facilitator? How do you make members accountable in order to claim "member" status? These are some of the questions we are wrestling with and hope to answer at the fall/winter retreat.

Currently, we have 55 members listed on the RSC email list. Of that 55,

- 18 are listed as facilitators:
Bob Leonard, Carlton Turner, Ebony Golden, Gwylene Gallimard, Hope Clark, Jaehn Clare, Jamie Merwin, Jeff Mather, John O'Neal, Kathie DeNobriga, Laura Schandelmeier, Mat Schwarzman, Paula Larke, Priscilla Smith, Rodger French, Sheila Gaskins, Sheila Kerrigan, Stephen Clapp, Trey Hartt
- 8 are listed as shadows:
Nana Agyeiwaah Anan, Eleanor Brownfield, Kim LeDee, Latonnya Wallace, Melanie St. Ours, Omari Fox, Shon Sims
- 4 are undetermined names:
blakcovergal@aol.com, iandadtom@aol.com, ik.analfabeet@gmail.com,
maitri_sa@yahoo.com,
- 4 listed but undefined:
 - Latrelle Bright, Chetan Talwakar, Michelle Milne, Carol Marie Webster

New members that joined this year include: John O'Neal, Camille Shaffer, Cecille Ericta, Denise Johnson, Jamie Merwin, Janelle Treibitz, Jesssica Bellamy and Mat Schwarzman.

EVENTS

Learning Exchanges (LE) continue to be the primary activity for Resources for Social Changes. In 2011 we organized and often led 4 total LE's.

In the People's Hands Intensive

Durham, NC

Lead Facilitator: Ebony Golden

Trainer: Jessica Solomon

Ebony Noelle Golden lead an interactive session with participants exploring creative approaches to liberation, RSC's principles of community engagement while framing the scope and range of the weekend intensive.

National Learning Exchange

Baltimore, MD

RSC was not the main organizer of this exchange but rather support in developing the curriculum and designing the facilitation of the 3-day event. RSC members were called upon as facilitators throughout the event and were instrumental in the planning team.

Clear Creek Festival

Clear Creek, KY

Lead Facilitator: Kathie DeNobriga

Co-Facilitators: Eleanor Brownfield, Trey Hartt, Maurice Turner (did not attend but helped plan)

Working with Robert Martin and Carrie Brunk (both ROOTS members and organizer of the festival), this Learning Exchange sought to advance the festival as a vehicle for social change & transformation.

Cucalorus Film Festival

Wilmington, NC

Lead Facilitator: Hope Clark

Co-Facilitators: Omari Fox, Melanie St. Ours (shadow & trainer)

This LE is set to take place November 10-13. A report will be given upon completion of the event.

EVALUATION

Members of RSC (Carlton Turner, Bob Leonard, Laura Schandelmeier, Stephen Clapp, Jeff Mather, and Trey Hartt) are in the middle of an evaluation process of RSC covering the past 3-5 years. The team has been tasked to develop an evaluation plan that will cover the following areas:

- RSC Internal Processes
- Learning Exchanges
- National Learning Exchange
- Partnerships
- C/APP Grant Program

The results of this evaluation process will be used to develop a 3-5 year plan for RSC in alignment with the overall ROOTS strategic plan.

Keryl McCord

Development Director

What a Difference a Year Makes 2010-2011

ROOTS' has had an incredible year since the 2010 Annual Meeting. There are so many people to thank for the success we've achieved we could not have done it without you all.

Alternate ROOTS has experienced an incredible year of growth, recognition, and momentum due in no small part to the bold step we took to produce ROOTS FEST 2011: Many Communities, One Voice.

Here are highlights of both our successes and our challenges over the past year.

In the fall of 2010 we publicly recognized the support of every donor on record, first the institutional donors, followed by individual donors. From all records, this was the first time all donors have been publicly thanked in this way in recent memory.

We'd like to note that ROOTS Fiscal Year is the calendar year. However, because we report to the overall AR board during the Annual Meetings this report spans both the FY 2010 and the as yet completed 2011 FY.

Renewed/ Project Specific Support Support

Nathan Cummings \$200,000 2 years (2010-2012)
Ford Foundation \$300,000 2 years (2010-2012)
The Fund for Southern Communities \$6,500
Open Society Foundations 2 years \$250,000 (2010-2012)
Kresge Foundation \$200,000 2 years (2010-2011)
Scion Exchange \$1000 (2010)
National Endowment for the Arts \$70,000 (2010-110)
New England Foundation for the Arts \$5,000
Forward Thinking Museum \$5,000 (20110)

Total \$1,036, 500

Pending Renewals/ Project Support

Kresge Foundation \$200,000 2 years (2012-2014)
NEA \$70,000 (2012)
Left Tilt Fund \$10,000 (2011)

Special Events

My Morning Jacket (Unknown dollar amount)

Individual Donations

\$17, 588.82

Although ROOTS Fest was a huge success in more ways than we can count, we were unable to overcome the challenge of trying to raise money to produce a first time event of this scale and scope, in a neighborhood that is largely invisible. It is not an exaggeration to say that those with the means and power to affect change have deliberately avoided the communities of West Baltimore they are invisible for a reason.

Here is a sampling of the local Baltimore foundations we solicited to support ROOTS Fest and West Baltimore without success:

Annie Casey Foundation
Abell Foundation
Enterprise Community Partners
Meyerhoff Foundation
Blum Family Fund
Bank of America (both Foundation and Corporate)
The Baker Fund
Associated Black Charities
Wachovia/ Wells Fargo Foundation
Goldseker Foundation
Ausherman Fund
M&T Charitable Trust

Additionally we solicited support from the following national sources:

Doris Duke Charitable Foundation
Andrew Mellon Foundation
Pew Charitable Trusts
William Penn Foundation

Through the experience of producing ROOTS Fest we learned that boldness counts, it may stretch us but we expanded to meet the need. We also learned that there are many people who support the work we do, who are in our corner. And that is a good thing.

Cecille Ericta

Finance and Office Manager

Finance and Admin

Highlights 2011

Streamlined Financial Processes resulting in accurate monitoring, tracking and reporting of the Financial Inflows and Outflows of the Organization;

Successful Audit-- less audit time, lower accounting fees and higher confidence of Auditors in our areas of Financial Management;

High turnaround of collection (A/R) and payments (A/P);

Researched and improved on the previous Policies and Procedures Manual to be in line with the times and for practices to be comparable with the other organizations in our field. Final draft of Policies and Procedures Manual under review by the Personnel Innovations Ensemble.

Currently working on how to effectively capture the Organizations In-kind Donations, Increase collection of Membership dues and continue with the practice of conscientious allocation of the organizations financial resources.