

STRATEGIC PLAN

2020-2023



AlternateROOTS
ARTS • COMMUNITY • ACTIVISM



ROOTS Week 2019. Photo: Melisa Cardona.





EXECUTIVE SUMMARY

Welcome to your 2020-23 ROOTS Strategic Plan! This plan is a culmination of a full year of work, led, informed, and driven by our members, every step of the way.

We are maintaining our commitment and throughline to our historical curriculum, Resources for Social Change (RSC), a training program developed to create social change through art. RSC began in the 1990s in recognition of the need to institutionalize ROOTS' knowledge in the field. Those organizational principles and values continue to be embedded in all programs and threaded through all our actions and decision making, including throughout this plan.

The plan you are about to review is possibly not like any nonprofit strategic plan you have seen before. ROOTS prides itself on being a progressive, innovative, and forward thinking organization, grounded in our commitment to the elimination of all forms of oppression, everywhere. We don't just invoke this promise with our programs, projects, and at ROOTS Week; you will see these principles in our practices and the way we work. Therefore, our Strategic Planning Committee decided that our plan needed to reflect this not just in the visioning but in the writing of the plan itself.

If you are looking for "Strategic Priorities" you won't find them, but you will find "Stories." If you are looking for "Action Items" you will find "Vision Items." If you are looking for a top down plan you won't find it. You will, however, see the aspirations of the plan reflected in our members' voices embedded in the plan, sharing stories from our 44+ year history.

Additionally, you will see a plan focused on the next four years in preparation for the following 5-10 years leading to our 50th anniversary in 2026 and beyond. For example, a short-term vision with the launch of our first ever multi-year funding

program, Partners for Change, will be actualized in 2020. Intermediate plans look like a partnership with members for advocacy work on environmental justice in 2021. Long term plans are reflected in something like completion of a feasibility study in 2023 to reconsider establishing a ROOTS home, a place for short term artists crisis housing, offices, creative space, and earned income generator, to be ideated in the next plan. It is a strong plan, and we are for the first time in the organization's history, prepared with staffing, finances, and resources to take it on. Maya Angelou says "The desire to reach the stars is ambitious. The desire to reach hearts is wise and most possible."

In addition to the groundbreaking narrative rooted in our history of storytelling, our staff-led team structure also reflects the non-linear/decentralized way we have always worked. Here, it is articulated not in a staff flow chart but a beautiful, artistic, non-hierarchical way of working together. As a 100% remote staff, we are leading the way for how teams can work in a more humanized, healthy, and sustainable ways.

Our values and guiding principles have not changed, nor has our commitment to the South. But what we do know, is that ROOTS is a nationally respected organization, because it has always been committed to this work since its founding in 1976. We are excited to share our road map for the next iteration of Alternate ROOTS! Come join us as we work a day at a time, hand in hand, using art to shape justice and move the needle closer to a world we may not see in our lifetimes, but know at our core, can only manifest if we boldly reclaim the power art has to change the world, one artist, one community, one day at a time.

Michelle Ramos
Executive Director, Alternate ROOTS





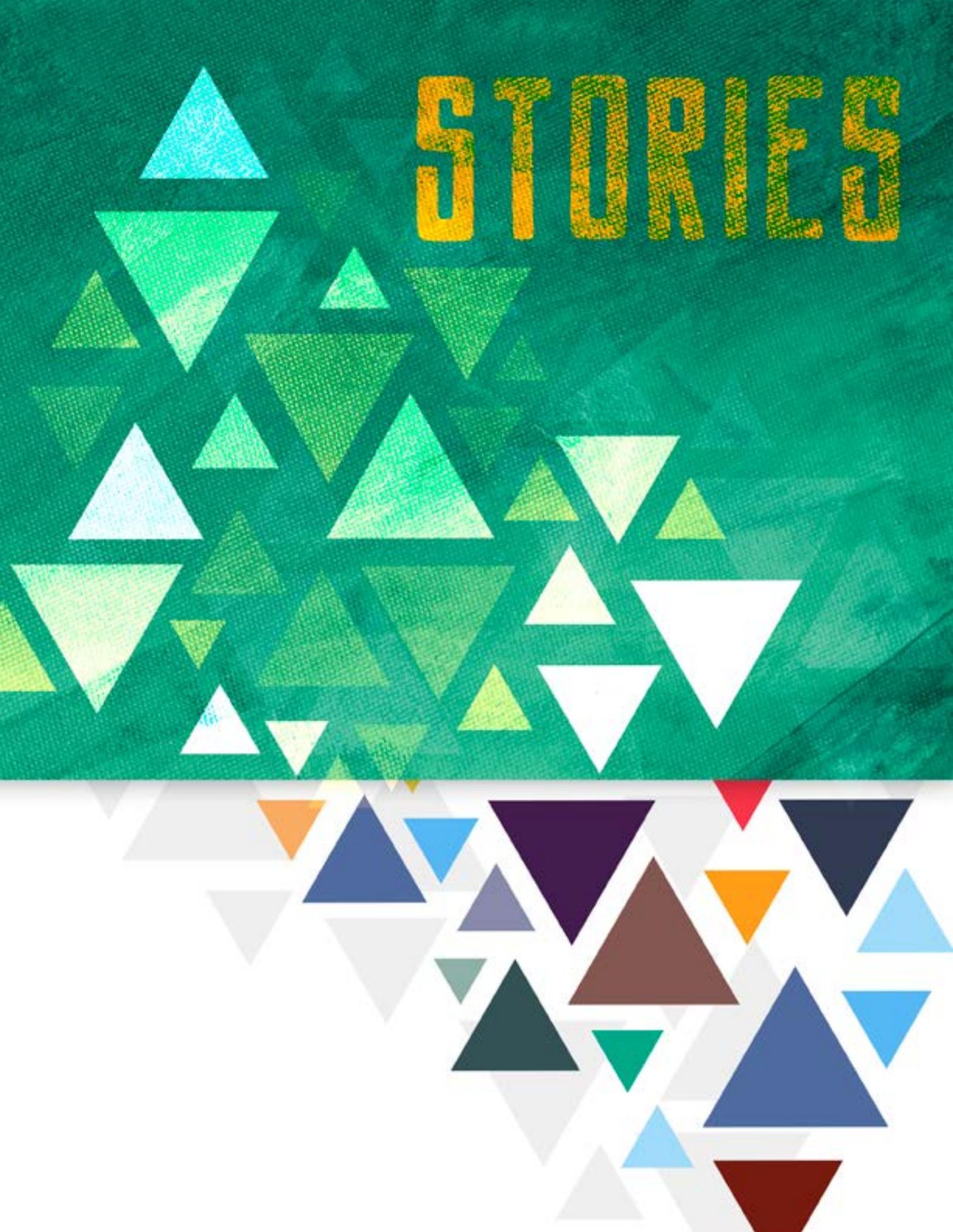
OUR MISSION

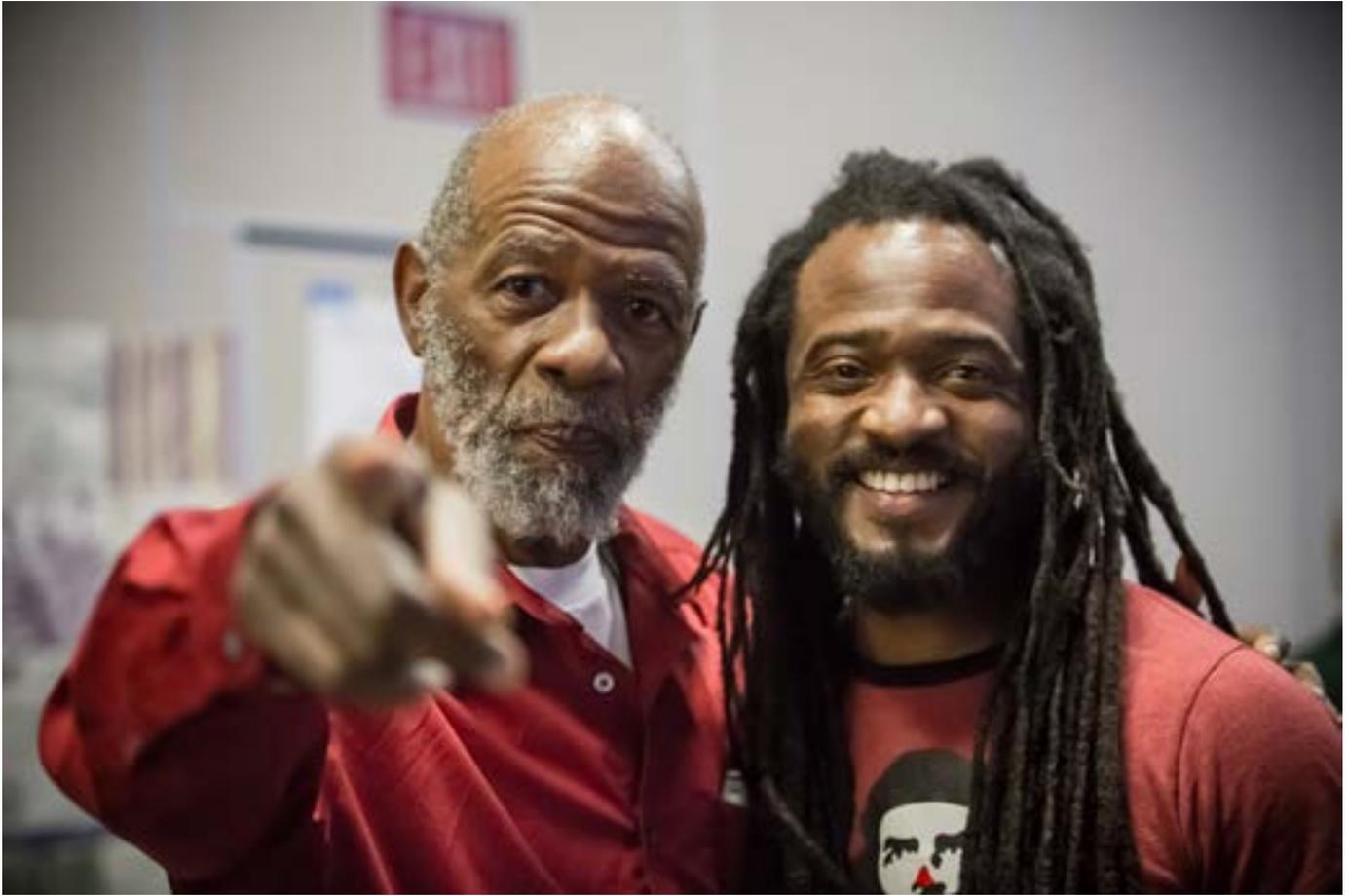
An organization based in the Southern USA, the mission of Alternate ROOTS is to support the creation and presentation of original art, in all its forms, which is rooted in a particular community of place, tradition, or spirit. As a coalition of cultural workers we strive to be allies in the elimination of all forms of oppression. ROOTS is committed to social and economic justice and the protection of the natural world and addresses these concerns through its programs and services.

STRATEGIC PLANNING PROCESS

Our mission and members have guided this year-long strategic planning process. In January 2019, all members were invited to join the strategic planning committee and 20 responded to that call. This group met monthly throughout the year, with smaller committees meeting more frequently to focus on different aspects of the strategic planning process, including: Programs, Finances, Communications, and Special Projects. The Data and Research committee conducted a field-wide scan and analysis of sibling organizations throughout the arts and social justice arena. In addition, they developed an extensive survey which was sent to members, field-wide partners, and external organizations not close to our community. With 40 respondents, this survey provided a wealth of ideas, opinions, and guidance and truly anchored the Strategic Planning Committee's work. The responses from members helped give rise to the five stories that comprise this strategic plan, as well as the vision items that are included within each story.

STORIES





John O'Neal and son William "Weebo" O'Neal at ROOTS Week 2016. Photo: Melisa Cardona.

WHY STORIES?

Since our inception, storytelling has been a foundational practice of community building, political education, analysis, and art making at Alternate ROOTS. A social technology as old as time, we as a community have come to know and practice a version of storytelling refined by one of our founders, and now ancestor, John O'Neal. With story as such a central way of being/knowing at ROOTS, it follows that our strategic plan would be story based. In addition to framing each strategic goal as a story, we have included member stories throughout the narrative, as a way of anchoring the plan in the spirit of our membership.



VISION STATEMENT

It's 2023 and we are on the other side of this strategic plan. What vision of Alternate ROOTS have we manifested?

Our roots are deeper, our branches stretch further, the soil is healthier. The ecosystem we exist within is more sustainable, better able to nurture art, activism, justice, and liberation. The grassroots work of ROOTS' members is coherent as a regional movement.

For our members, for our organization, for our communities, for our world, we envision: health, strength, vibrancy, and balance.

We are time-tested and experimental; we are stable and in motion. We are growing deeper and wider; we are regionally catalytic and nationally impactful. We are keenly focused on racial justice and attending to intersectionality; we are uprooting oppressions and enacting liberation. We are rooted in our history and ever evolving.

It's 2023. We are taking a deep breath, reflecting on the past four years, and looking to the future once again.



Spirit McIntyre, performing as part of Taco Truck Theater / Teatro Sin Fronteras at ROOTS Week 2019, along with Roberto Carillo and José Torres-Tama. Photo: Melisa Cardona.





STORY OVERVIEW

STORY ONE: PAGE 8

Honoring & Activating ROOTS Legacy

STORY TWO: PAGE 10

Growing Where We're Planted: Strengthening Our Membership & Current Programs

STORY THREE: PAGE 14

Meeting this Moment: New Growth

STORY FOUR: PAGE 18

Financial Stability & Strength

STORY FIVE: PAGE 21

Internal Elevation / External Amplification



STORY



Members announce ROOTS archive's move to Amistad Research Center at ROOTS Week 2019. Photo: Melisa Cardona.

Honoring & Activating ROOTS Legacy

We are still here. As we approach our 45th anniversary, we are stronger than we have ever been. Our membership has expanded. We are supporting more artists, in more ways. We have a greater impact across our region and the nation. But, as has been true for the past four decades, the need and urgency for our work continues.

Our history and legacy ground us in our traditions and values, hold us true to our mission, and remind us that – as ROOTS has always done – we must continue to evolve to meet the needs and opportunities of this time. In the coming years, we will honor and activate our legacy by securing our archive and making it accessible, by telling our story in its rich complexity, and celebrating our 45th anniversary in 2021.

VISION ITEMS

- Partner with Amistad Research Center – an independent, non-profit archive housed at Tulane University in New Orleans – to house and publicly launch our archives
- Celebrate our 45th anniversary milestone, honoring the past with an eye on the future
- Continue to develop the ROOTS book, *It'd Take Some Tellin'* – conduct interviews, commission essays, identify a publisher, and complete a first draft
- In anticipation of our 50th anniversary in 2026, we will develop and resource a plan to create a ROOTS documentary film

MEMBER STORIES

The Road Company, *Echoes and Postcards*.
L-R: Emily Greene, Jo Carson, Eugene Wolf,
Christine Murdock, Ed Snodderly. Photo:
Alternate ROOTS Archive.



“Those people that were going to be ROOTS.”

Jo Carson, (she/her) Johnson City, TN & Kathie deNobriga (she/her) Pine Lake, GA

Jo Carson organized what came to be known as Alternate ROOTS' first annual meeting, held at the Highlander Center in 1976. This story of that meeting was recorded in 2010, by Kathie deNobriga, before Jo's passing.

Jo: We invited a lot of different people, we invited community theatres, we invited semi professional people, university theatres – just whoever, just a wide variety. And they sort of self-selected. Some people got there on Friday afternoon and went home Friday night. Some more people went home on Saturday morning. And I was feeling like a real failure because so many people had looked at this and gone, “I don’t have anything to contribute here, I’m not interested, I’m going home.”

Harry Keuper was a speaker and I have no earthly idea what Harry said, because people had self-selected to the point where, those people that were going to be ROOTS weren’t interested in what the speakers had to say.

Kathie: That is surely in our DNA. “I don’t care what the experts have to say, we’re gonna go outside here and talk.”

Jo: That’s essentially what happened. And by Sunday morning, we knew there was a group to come together except we didn’t want it to be the usual hierarchical kind of thing, and so it had come to be understood it was a large salad. There were some radishes and some onions, and we needed a head carrot. And Marty Ardren was there from Florida and she decided to be the head carrot.





UpROOTing training, ROOTS Week 2017. Photo: Melisa Cardona.

Growing Where We're Planted:

Strengthening Our Membership & Current Programs

We know that the heart of ROOTS is our membership. ROOTS was founded on person to person, artist to artist connection. That yearning for mutual support, that deep knowing that we need one another – this was the catalyst for the beloved community we hold sacred today. Our relationships are our lifeblood.

We also acknowledge our present community is not representative of all the people who call the South home. Keeping in our tradition of evolution and growth, we seek to build and deepen relationships with Native/Indigenous, Latinx, TGNCNB12-S (Transgender, Non-Conforming, Nonbinary, Intersex, and 2 Spirit), disability, and youth communities. Alongside this, we'll continue our UpROOTing work – internally and externally – so that we are a nourishing place for all Southern artist-activists to thrive, while also supporting and leading field-wide growth in the areas of equitable practices.



Through member feedback, we also hear that there's a lot that we're getting right. As one member wrote in their strategic plan survey: "Nothing we're not doing, just MORE of what we're doing!" In that spirit, we'll strengthen our current granting/partnership programs, Artistic Assistance and Partners in Action, beginning with member assessments. We'll continue to work to make ROOTS Week and ROOTS Weekends more accessible to more people, while also activating our other models of gatherings – Rhizomes and Learning Exchanges – to strengthen our member connectivity across the region.

VISION ITEMS

- Continue to develop organizational structure, capacity, and culture – which includes members, **Executive Committee**, and staff – that meets the needs of our work and aligns with our mission and values
- Continue and expand **UpROOTing** internally and externally
- Build relationships with and create greater avenues of support for Native/Indigenous artists in the South
- Develop language justice as a vibrant, living part of ROOTS culture
- Work with TGNCNB12-S members to grow our practices of gender liberation and material support of TGNCNB12-S artists
- Deepen our practices of accessibility and inclusion to better support artists with disabilities
- Grow the **YOOTS** (ROOTS Youth) initiative, via a youth leadership program and designated spots for YOOTS in ROOTS events, programs, and leadership
- Strengthen **Artistic Assistance** and **Partners in Action** by conducting program evaluation/needs assessment, and annual increases in the amount of funds and technical assistance disbursed
- Deepen the relationship between Partners in Action projects and ROOTS organization-wide action plans for undoing all forms of oppression
- Expand impact of **ROOTS Week** and **ROOTS Weekends** by making the convenings more accessible and increasing **Learning Exchange** and **Rhizome** activities to increase regional member engagement

MEMBER STORIES



Latinx Work Group meeting at ROOTS Week 2018. Photo: Melisa Cardona.

“Nobody had an answer, but we started talking and came up with something.” — *Stephen Clapp (he/him) | Washington D.C.*

I don't remember the year, it was at Lutheridge and there was a huge divide in the annual meeting participants that was pretty much along generational and also along racial lines. The long term, mostly white ROOTers were convening at Late Night and the newer ROOTers, mostly of color, were having their own Late Night. And this has been given some inappropriate title, I think “Hip Hop vs. the Hippies.”

The Executive Committee was meeting on the porch outside the dining hall. This was a time when the Resources for Social Change was really active and they marched on the Executive Meeting with W's on post-its and they were chanting: “Where there's a Will there's a Way.” On the Executive Committee there was the sense that, “We can respond, and we have to respond.”

There were a series of conversations, the Executive Committee and Resources for Social Change coming together. Nobody had an answer, but we started talking and came up with something, and it launched a longer dialogue over time.





“Able to morph and shape and grow.”

— *Nathalie Nia Faulk (they/them & she/her), New Orleans, LA*

My first introduction to ROOTS was back in 2017, I was part of this performance troupe called Last Call. As soon as we got there, I actually ran into one of my old friends, Leti, and I was like, “what are you doing here?” and they were like, “this is my people.” So I immediately was affirmed that, if those are Leti’s folks, those are my folks.

And that was the second time ever that I felt comfortable enough to share one of my short stories. I couldn’t even look up. The whole time I was just shaking, looking at indee who is an amazing comrade and being like, “why am I doing this?” And when I finished, everyone was just kind of, hands on chests, nodding, smiling, and just started screaming and I felt that warm bubbling up – being seen, being validated. As a Black Trans Femme, it was so good to just be in my body and be visible. And not only was I able to just be in my Trans Femme self, I was also able to be smart and Trans Femme, I was also able to feel confident and not be sexualized as a Trans Femme, I was able to be creative and not just this person that is here to smile and make everyone not uncomfortable with their trans-ness. I was able to be all of those things and expand into my true person.

And so, next year came around and I was invited to be on the YOOTTS Council. And last year I was invited to be on the UpROOTing Oppressions team. And lastly, this year there was a job opening and when I applied I was like, “I’ll see what it is. I need to test myself to work with bigger organizations and to do more change on a systemic level. Let’s see what we can do.” And then I was chosen.

And so that really affirmed for me that ROOTS is here for their people and is invested in hiring Trans folks and is invested in changing the narrative around who is seen as experts and is invested in growing folks. Not that it is 100%, all of the time – but it can be, and there are ways that ROOTS can keep growing. ROOTS seems able to morph and shape and grow and be replanted and allow their seeds to fly and be pollinated in other places. And I think that’s really beautiful.

STORY 3



L-R: Nick Slie and Hannah Pepper-Cunningham perform Mondo Bizzaro's *The Way at Midnight*, ROOTS Week 2017. Photo: Melisa Cardona.

Meeting this Moment:

New Growth

We accept this new challenge: our members have voiced the need for ROOTS to move into new areas of work, to meet this moment with creativity and willingness to change. We're being called to grow in ways that balance and integrate arts and activism, and tend to the sustainability of our members, our organization, and our planet.

Through survey responses, we heard, again and again: "we need to focus on climate justice," "we need to respond to the climate crisis," "the environment is the social justice issue where all others intersect." And so, as we dig into our public policy work and deepen our partnerships with social justice organizations in our region, we will maintain a focus on climate justice – the way it impacts the South in particular, and the ways in which Southern culture workers are rising up to lead this movement.





We will also build programs that support our members’ ability to make a living as artists, activists, and cultural workers. Through exploring partnerships with organizations that support touring, we aim to create clearer, more resourced channels for artists to share their work and build their audiences. Through the Greenhouse program, we’ll support our membership’s ability to develop stability through financial literacy and business training. Through Partners for Change, we build on the success of Partners in Action and adapt the organizing strategy at its heart to this new partnership program, which will offer the first multi-year funding in ROOTS’ history.

Finally, we will begin preliminary work toward a vision of a ROOTS home – a physical space that will be a resource for members and staff as well as a source for financial stability for the organization. A long term goal, we will conduct a feasibility study during the course of this strategic plan with the aim of a grand opening in time for our 50th anniversary in 2026.

VISION ITEMS

- Activate ROOTS’ public policy mission
- Engage in and disseminate environmental policy research and advocacy via brown papers and Learning Exchanges throughout the region
- Develop trainings in line with national/regional arts advocacy efforts
- Increase partnerships with social justice organizations throughout the South
- Re-imagine and re-develop a new Touring Support program
- Create and implement the Greenhouse program
- Explore the investment opportunity of purchasing a multi use property as a physical home/office/art space for members and staff
- Create and implement the Partners for Change program, funded by the Surdna Foundation for three years

MEMBER STORIES



Truthworker Theatre Company performing at ROOTS Weekend: Richmond – Creating a World Without Prisons. Photo: Jasmine Brown 2017.

“To join the movement as it already exists.”

— Nikki Brown (she/her) | Durham, NC

ROOTS has shown up in ways that have been beautiful and wonderful, without, you know, creating its own thing. It’s been able to join the movement as it already exists and support the work, and amplify the work of its members who are doing things to move policy – groups like Project South, like Spirithouse, like Art 180, who are doing work around various policy front lines.

For example, there was a ROOTS Weekend in Richmond, Virginia, that was around the criminal injustice system – the prison-industrial complex and privatization and the fact that it’s truthfully not about reform, it’s not about restoration. It’s really about a capitalist system of moneymaking that keeps folks enslaved.

So I’ve seen ROOTS show up in those ways really beautifully. And I would like to continue to see ROOTS move policy by supporting those ROOTS members who are doing this work.





“What histories do we remember when we are projecting new futures?”

— Nick Slie (he/him) | New Orleans, LA

We’re working on this project called Invisible Rivers, which is looking at the ancestral paths of the Mississippi River. We’re investigating how the systems and structures of control that it takes to wrangle a river, how have those systems of control showed up on the territories of experience of the people? And how is it that we’re now ready to “re-wild” the land when we haven’t sufficiently “re-wilded” ourselves?

In this time of rapid climate movement, and rapid climate development, and so many people engaged in climate and it’s moving so fast – my big question is: what histories do we remember when we are projecting new futures?

And that’s specifically where I see ROOTS engaging this question of climate change in a way that no one else can. How do we address this question that is specifically southern, in the agrarian South, that has to do with indigeneity in the South? That has to do with the African American experience in the South? That has to do with how many people came to populate and make the South “the South?” And all those issues that are so specific to us, how do we use them as the lens to buoy our conversation about climate?





L-R: Rebecca Mwase, Nikki Brown, Robert “Bobby B.” Martin, Ashley Minner as they complete their Executive Committee service at ROOTS Week 2016. Photo: Melisa Cardona.

Financial Stability & Strength

We are responsible stewards of ROOTS resources. We are on sound financial footing, but recognize we must be intentional in planning to stabilize and diversify the financial life of the organization. A vast majority of our funding comes from one source: foundations. We need to ensure our income is derived from a variety of sources to maintain our sustainability through unforeseen shifts in the funding environment. We aim to achieve this through a robust four-year financial plan, investment strategies, development of earned income, and creating a culture of abundance around fundraising.

We strive to empower our membership through the Greenhouse financial literacy and business training, and fiscal sponsorship programs. We will work to cultivate a more financially conscious membership through participatory opportunities including budgeting, financial review and analysis, and fiscal decision making.

We are determined to establish a fund to support our members in a timely fashion, especially elders, in times of need.



VISION ITEMS

- Build a sustainable, four-year financial planning strategy, including financial projections for five years
- Develop an investment strategy in alignment with ROOTS' values
- Develop a business/marketing plan for expanding and diversifying earned income streams, including membership fees, contract services income, and fiscal sponsorship fees
- Create a culture of abundance around fundraising
- Develop and implement an emergency financial assistance plan for member artists
- Cultivate consciousness about financial matters among staff/members/Executive Committee



MEMBER STORIES



Closing circle, ROOTS Week 2019. Photo: Melisa Cardona.

It was just: “Okay, what do you need?”

— Malika Redmond (she/her), Atlanta, GA

When Margaret Kargbo and I were preparing to launch Women Engaged, we were two weeks out to the public launch when she passed suddenly.

So that was a very – it was a very difficult time. Not only personally, but also for the organization. And ROOTS was just newly our fiscal sponsor. Paige and Carlton (who was the ED at the time) wrapped themselves around me in terms of support for Women Engaged, that everything is going to be okay for the organization. The support was just right there, it was immediate, it was whatever they could do to help.

That support through a trying period – there was no, “Are you sure you're ready?” There was none of that. It was just: “Okay, what do you need?”

When you have a fiscal sponsorship relationship with an organization like Alternate ROOTS that really trusts you, trusts what you're doing, sees the value and the importance – it's just invaluable. The partnership is our backbone.



STORY 5



Eli Lakes documenting ROOTS Week 2019 with Imhotep Dlanod looking on. Photo: Melisa Cardona.

Internal Elevation / External Amplification

We must shine. We have a wealth of intergenerational knowledge held within our membership. We are doing amazing work that the world needs to know about. We envision our website, newsletters, and social media as celebrated platforms that amplify the extraordinary work of our members and draw more people towards ROOTS. We envision communications, marketing, and content development that continually position ROOTS as a thought and practice leader in the field of art and social change.

To better strengthen our communications and marketing capacity, we'll work with a consultant to develop a long-term strategy that takes the 45th anniversary as an opportunity for a "refresh" and the 50th as a chance to "rebirth" our public profile and communications strategy. We'll consider the possibilities of rebranding, website redesign, and seek a mission and culture aligned language and practice of "institutional marketing."

Alongside this, we'll revive our practice of robust content creation, strengthen and redefine our social media presence, develop new media, and produce a 45th anniversary organizational report. Throughout it all, our overall vision will be to lift up and support the many voices of Southern artist activists.

VISION ITEMS

- Develop and implement an institutional marketing/communications strategy plan
- Lift up and amplify the many voices of ROOTS' Southern artists & activists through robust content and expanded social media presence



The magic of ROOTS Week: spontaneous dance parties on the porch, during a rainstorm.
Photo: Melisa Cardona.





MEMBER STORIES

“We are sharing medicine.”

— *Melisa Cardona (they/them & she/her), New Orleans, LA*

It was 2014, maybe, 2013 – I was called up at Late Night to sing a song I had heard. I just kind of wrote it down because I heard these kids playing it on a street in New Orleans. I was so infatuated by the melody I went back to ask the kids about it and they weren't there. I went into the shop and the owner said, “Honey, no one's been out there all day.” So I don't know if they were spirits or what...

So I got called up to sing this song, with eight women. The song was called “Can't Nobody Save My Soul.” Everyone in the crowd got up with us and was dancing. Dancing and jumping and drumming. And it kept going for like 30 minutes. Everyone was jumping together, so much that the wood of the floor was popping up and down. We were all just one.

When we ended, everyone was out of breath, looking at each other with these gentle grins. And someone yells, “That's what I'm talking about – where else in the world can we get that?”

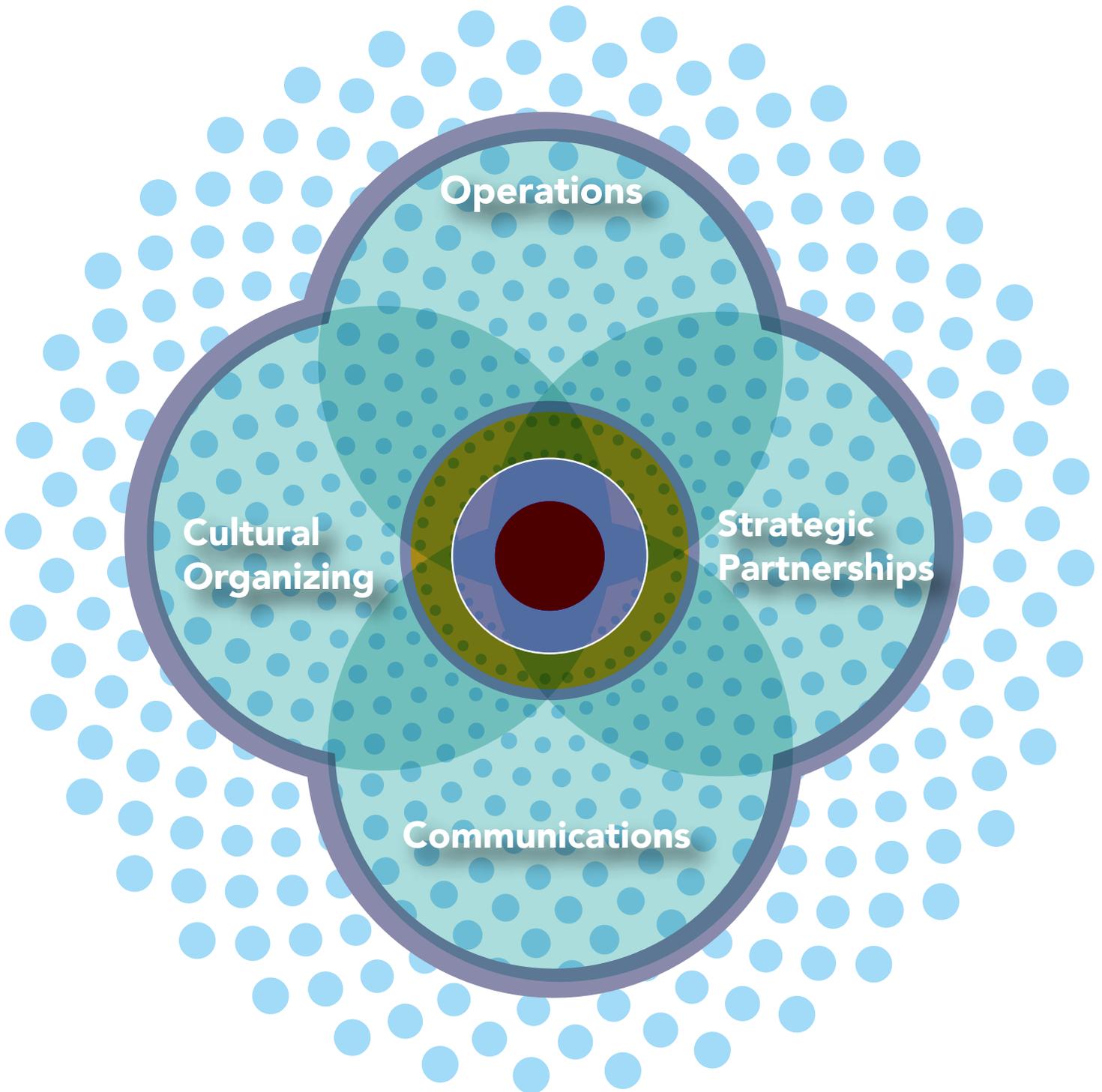
It was Carlton Turner.

There's a special communication that sometimes happens at ROOTS. You're not consciously trying to jump together, you're just doing it. There's something that happens when you're all operating as a unit and you're all being fed out of the same jar, the same kind of medicine, at the same time – we all feel it together. And that medicine can be words, it can be song, it can be spirit. The ideal goal of communications for me is that we are consistently sharing medicine.



ORGANIZATIONAL CHART

Alternate ROOTS Members
Executive Director & Committee
Development
Special Projects
Alternate ROOTS Mission



We as a member-led organization and staff, seek to work in ways that align with our values. This organizational chart was developed by the ROOTS staff in the fall of 2019. It reflects the beauty of our organizational model and the collaborative, team-based way our staff works. It also challenges us to continually evolve our practices and structures and keep growing into our values, especially when it comes to shared power. We share this chart at the start of this plan, expecting that it will change and evolve in the coming years.

FINANCIAL OVERVIEW

Please note: these budget overviews are a projection of what it will take to complete the work listed in the Strategic Plan, NOT the overall organizational budget for the coming years.

Financial Projections: at a Glance

Projected Total Expenses

Vision Items	2020-23	2020	2021	2022	2023
Story 1: History & Legacy	264,730	72,850	113,230	38,730	39,920
Story 2: Growing Our Membership & Current Programs	1,061,990	123,540	291,100	281,520	375,130
Story 3: Meeting This Moment: Expanding & Deepening	525,960	143,750	150,840	141,200	90,170
Story 4: Financial Stability & Strength	214,050	58,530	41,200	34,320	80,000
Story 5: Internal Elevation/ External Amplification	219,420	44,820	60,920	56,840	56,840
Total Projected Expenses/ Strategic Plan 2020-23	2,286,150	443,490	657,290	552,610	642,060

Financial Projections: by Vision Items

Projected Total Expenses

Vision + Action Items	2020-23	2020	2021	2022	2023
Story 1: History & Legacy					
• Celebrate our 45th anniversary	72,700	9,500	63,200	-	-
• Publicly launch of ROOTS archives	34,780	10,830	12,210	5,870	5,870
• Completion of the first draft of the ROOTS book	152,550	52,520	37,820	30,560	31,650
• Complete development plan for ROOTS documentary	4,700	-	-	2,300	2,400
Total Projected Expenses/ Story 1: History & Legacy	264,730	72,850	113,230	38,730	39,920



Vision + Action Items

Projected Total Expenses

Story 2: Growing Our Membership & Current Programs

	2020-23	2020	2021	2022	2023
• Expand the impact of ROOTS Week & ROOTS Weekends by making the convenings more accessible & increasing Learning Exchanges & Rhizome activities to increase regional member engagement	351,120	18,820	112,300	110,000	110,000
• Build relationships with & greater avenues of support for Native/ Indigenous artists in the South	95,900	28,220	22,560	22,560	22,560
• Strengthen & expand the Artistic Assistance program	68,680	7,600	20,360	20,360	20,360
• Continue & strengthen the Partners in Action program	173,400	6,300	55,700	55,700	55,700
• Strengthen & expand the YOOTS (ROOTS Youth) program	42,050	6,200	11,950	11,950	11,950
• Continue & expand UpROOTing/Racial Justice internally & externally	32,900	1,080	12,910	11,830	7,080
• Work with LGBTQ members - especially trans and gender expansive folks - to grow our practices of gender liberation & material support of LGBTQ artists	92,920	24,780	24,780	21,680	30,980
• Deepen our practices of accessibility & inclusion to better support artists with disabilities	92,920	24,780	24,780	21,680	21,680
• Work around organizational structure	23,040	5,760	5,760	5,760	5,760
• Develop Language Justice as a vibrant, living part of ROOTS culture	89,060	-	-	-	89,060
Total Projected Expenses/Story 2: Growing Our Membership & Current Programs	1,061,990	123,540	291,100	281,520	375,130

Story 3: Meeting This Moment: Expanding & Deepening

	2020-23	2020	2021	2022	2023
• Activate ROOTS public policy mission	155,140	51,100	55,640	55,640	24,200
• Engage in environmental policy research & dissemination of information/advocacy via brown papers & learning exchanges throughout the region	70,800	8,340	20,820	20,820	20,820
• Develop advocacy trainings in line with national Arts Advocacy Days & regional Arts Advocacy efforts	16,760	5,360	3,800	3,800	3,800
• Increase partnerships with social justice organizations throughout the region	19,020	3,120	5,300	5,300	5,300
• Re-imagine & re-develop a new Touring Support program that highlights identified needs throughout the field & the South	42,400	-	-	21,800	20,600
• Create & implement the Greenhouse program financial literacy & business training	100,550	40,550	30,000	30,000	-
• Explore the purchase of a multi-use property as a physical home/office/art space for ROOTS members & staff	15,450	-	-	-	15,450
• Creation & Implementation of the Partners in Change program, funded by the Surdna Foundation for 3 years	105,840	35,280	35,280	35,280	-
Total Projected Expenses/Story 3: Meeting This Moment: Expanding & Deepening	525,960	143,750	150,840	141,200	90,170



Vision + Action Items

Projected Total Expenses

Story 4: Financial Stability & Strength

- Build a sustainable 4 year financial planning strategy, including financial projections, for 5 years
- Develop an investment strategy in alignment with ROOTS values
- Create a marketing/business plan & strategy for expanding & diversifying earned income streams, including membership fees, contract services income & fiscal sponsorship fees
- Create a Culture of Abundance at ROOTS
- Develop & implement an emergency financial assistance plan for members & a fund for elder assistance
- Cultivate a steady consciousness & awareness of ROOTS finances among staff, members & ExComm

	2020-23	2020	2021	2022	2023
	60,000	15,000	15,000	15,000	15,000
	5,600	-	5,600	-	-
	5,600	-	5,600	-	-
	81,400	36,400	15,000	15,000	15,000
	55,520	1,200	-	4,320	50,000
	5,930	5,930	-	-	-
Story 4: Financial Stability & Strength	214,050	58,530	41,200	34,320	80,000

Story 5: Internal Elevation/ External Amplification

- Develop & implement an institutional marketing/communications strategy & infrastructure plan for ROOTS
- Elevate ROOTS Profile/Lift up & amplify the many voices of ROOTS' Southern artists & activists

	85,400	33,900	19,500	16,000	16,000
	134,020	10,920	41,420	40,840	40,840
Story 5: Internal Elevation/External Amplification	219,420	44,820	60,920	56,840	56,840



GLOSSARY

Artistic Assistance is a program of Alternate ROOTS that provides direct support to individual artists and cultural workers in the South to enhance their skills, create unique projects, and build community. The program has two funding areas: Professional Development and Project Development.

The **Executive Committee** (often called “ExComm”) is ROOTS’ body of elected representatives. With over 100 voting board members, the ExComm is elected from among the membership to serve in the way a traditional board would – meeting in person quarterly and by video call monthly to address organizational needs, offer member feedback, and provide governance and strategic direction.

Fiscal sponsorship is a formal arrangement in which an organization with 501(c)(3) status sponsors a project/artist/organization without one, allowing the sponsored organization to seek grants and solicit tax-deductible donations under the sponsor’s 501(c)(3). In return, the sponsor organization collects a fee based on the total donations received by the sponsored organizations. ROOTS offers fiscal sponsorship as a benefit of membership.

The Alternate ROOTS **Greenhouse** is a grassroots incubator for our artist, activist, and culture worker members. The program includes training, mentorship and consulting in areas including financial services and budgeting, fundraising, marketing, and other business skills.

A **Learning Exchange** is one of our cultural organizing strategies; it is an opportunity for a community, a group of people, artists, facilitators/trainers, and any combination thereof to come together around an agreed upon topic. Learning Exchanges affirm that all the knowledge that is needed to develop solutions to any given problem is already in the room.

Partners for Change is an artist support program and a strategic commitment to ending racism and other oppressions through investments in artist/activists of color in the South. Partners for Change expands on the success of the existing Alternate ROOTS Partners in Action program, and builds off the organizing strategy at its heart. The program offers artists/activists multi-year funding for their work and personal needs.

Partners in Action is a program that allows ROOTS the opportunity to be a supportive partner working with progressive activist artists from all artistic disciplines. Partners in Action funds social justice partnerships in grassroots communities throughout ROOTS’ fourteen state region in the U.S. South. Partners in Action offers support and resources needed to work with more strategy and consistency.





Resources for Social Change was a training program developed by ROOTS from the early 1990s to 2013 that taught ideas and techniques to create social change through art. The program began in recognition of the need to institutionalize ROOTS’ knowledge in the field. In 2013, Alternate ROOTS decided to transition toward the idea that we are all Resources for Social Change. As such, the program has become an organizational principle, embedded in all our work and threaded through all our actions and decisions.

Rhizomes are low-key local events hosted by ROOTS members. When ROOTS members come together to share their art and organizing, learn about others’ work, and build strong local networks, ROOTS calls these gatherings Rhizomes. Rhizomes are vital to the long-term sustainability of Alternate ROOTS – they grow and nurture our coalition of artists and cultural workers around the region.

ROOTS Week Annual Meeting & Artists’ Retreat is a one-of-a-kind gathering – six days of performances, art and organizing workshops, UpROOTing sessions, visual art exhibitions, our famous Late Night cabarets, and ROOTS’ annual business meeting, in a retreat-like setting in the mountains of North Carolina. Artists, cultural organizers, and their families come from across the South (and beyond!), joining an ever-growing, ever-evolving coalition of people committed to building a just world through arts, community, and activism.

ROOTS Weekends are a condensed version of ROOTS Week. These three-day convenings bring artists, activists, and cultural organizers together to build community and share work through workshops, dialogues, visual arts, and performances. ROOTS Weekends help develop a deeper understanding of the work going on within the region, lifting up the ways artists are working in local communities to develop creative solutions to long-standing issues.

UpROOTing is Alternate ROOTS’ very own organically grown, custom-made anti-racism/anti-oppression training program. After several years of contracting outside facilitators to lead our anti-racism/anti-oppression trainings at ROOTS Week, we realized we wanted to and were capable of doing this work ourselves. Since 2017, an ever-evolving team of ROOTS members has met to design UpROOTing for ROOTS Week and ROOTS Weekends. ROOTS and ROOTers have a long history of anti-racist and anti-oppression learning and work that manifests in the work of UpROOTing.



L-R: Paula Larke and Elise Witt sing together at the ROOTS Week 2016 40th Anniversary celebration. Photo: Melisa Cardona.



GRATITUDE

Many thanks to the dedicated Alternate ROOTS members and staff who made up the **2019 Strategic Planning Committee**, whose radical imaginations, collaborative spirits, and hard work brought this strategic plan about. Thank you also to the many members, partners, and allies who completed the survey, participated in the field-wide study, joined the ROOTS Week story session, and reviewed drafts of the plan.

Alternate ROOTS Members

**Executive Committee Members*

Bob Leonard*
Camille Shafer
Joe Tolbert
Lisa Mount
Mike Anestor
Monique Davis*
Samuel Valdez*
Stephen Clapp, Strategic Planning Committee Co-Chair
Yvette Hyater-Adams*

Alternate ROOTS Staff

**Former Staff Members as of summer 2020*

Aimee McCoy (she/her), Operations Manager
Ashley Walden Davis (she/her), Director of Strategic Partnerships*
Clarissa Crawford (she/her), Strategic Partnerships Strategist
indee mitchell (they/them & he/him), Cultural Organizing Programs Administrator
Jennifer Williams (she/her), Communications Coordinator & Wordsmith
Mark Kidd (he/him), Development Associate*
Melisa Cardona (they/them & she/her), Communications Specialist
Michelle Ramos (she/her), Executive Director & Strategic Planning Committee Co-Chair
Nathalie Nia Faulk (they/them & she/her), Cultural Organizing Programs Coordinator
Nicole Gurgel-Seefeldt (she/her), Communications Director
Paige Heurtin (she/her), Operations Director
Raven Crane (they/them, he/him & Raven), Executive Assistant
Wendy Shenefeldt (she/her), Cultural Organizing Director

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AlternateROOTS
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