ROOTED WI, INC.

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EIN: 39-1854762
Report Generated on: 07/26/2023

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ROOTED WI, INC.

aka Rooted, fka Urban Open Space Foundation fka Center for Resilient Cities

Madison, WI

www.rootedwi.org

(608)240-0409

MISSION

Collaborations rooted in food, land, and learning.

Rooted evolved from a desire to merge the strengths of two vibrant Madison organizations—Center for Resilient Cities and Community GroundWorks—committed to enabling people to grow and thrive in healthy, equitable, and sustainable neighborhoods.

EIN
39-1854762

RULING YEAR
1996

IRS SUBSECTION
501(c)(3) Public Charity

FOUNDING YEAR
1996

MAIN ADDRESS
2702 International Lane, Suite 200
Madison, WI 53704

AFFILIATION TYPE
Independent Organization

CONTACT
Marcia Caton Campbell PhD, Executive Director
(608) 240-0409
marcia@rootedwi.org

EXECUTIVE DIRECTOR
Marcia Caton Campbell

DEPUTY DIRECTOR OF OPERATIONS
Ginny Hughes

BOARD CHAIR
Joe Sensenbrenner

SUBJECT AREA
Environment

Agriculture, fishing and forestry

Urban development

Community improvement

Community beautification

NTEE Code
Community, Neighborhood Development, Improvement (S20)

Other Food, Agriculture, and Nutrition N.E.C. (K99)

Environmental Quality, Protection, and Beautification N.E.C. (C99)
PROGRAMS

1. Badger Rock Neighborhood Center/Urban Farm
   Population(s) served: Adults, Families, Low-income people, Children and youth

2. Troy Farm
   Population(s) served: Adults, Children and youth, Economically disadvantaged people

3. The Gardens Network
   Population(s) served: Families, Economically disadvantaged people, Multiracial people, People of Southeast Asian descent, People of African descent

POPULATIONS SERVED

1. Children and youth
2. Adults
3. Families
4. Multiracial people
5. Economically disadvantaged people

COMPLIANCE

- IRS Pub 78 Verified as of July 2023
- IRS BMF 509(a) (1) as of July 10, 2023
- A-133 Audit Required/Performed?
- Conflict of Interest Policy
- Written whistleblower policy

Section 509(a)(1) organization as referred to in Section 170(b)(1)(A)(vi)

TRANSPARENCY MEASURES

- Board Practices Reported?
- Diversity Data Reported?
- Number of Independent Board Members
  8
Programs & Results

PROGRAMS
Source: Self-Reported by Organization, February 2023

Badger Rock Neighborhood Center/Urban Farm

Population(s) Served:
General/Unspecified Families

A place for neighbors to gather and connect. Monthly CommUNITY Dinners and year-round programming support neighbors of all ages, families and children. Our weekly Badger Rock Community Market offers fresh, locally and organically grown produce, and gives neighborhood artisans/entrepreneurs the opportunity to sell the products they make.

Badger Rock Urban Farm is an educational farm supporting healthy food access in the surrounding neighborhoods. The farm is managed by our staff and is a learning space for students attending Badger Rock Middle School (BRMS). As part of their school-year garden class, BRMS students use organic growing practices, starting produce from seed in a heated greenhouse over the winter, planting out seedlings in two hoop houses and garden beds come spring, and tending the gardens with our staff. In the summer, former BRMS students, now high school age, return as interns who are paid a stipend for their work. Produce is sold at the Badger Rock Farmstand.

In 2021, the farm supported 200 households using a market share, community-supported agriculture model, with discounted memberships for income-qualified households. For 20 years, we have offered a Beginning Farmer Training Program.

The Gardens Network

Population(s) Served:
Economically disadvantaged, low-income, and poor people

The Gardens Network is a collaborative partnership between Rooted, UW-Madison – Extension Dane County, and the City of Madison. The network includes an array of organizations, garden organizers, systems, municipalities, initiatives, funders, and programs working on community food issues in Dane County.

We connect people in Dane County with the space, education and resources to create and sustain community gardens that foster food, engagement, and equity.

We're rising to meet this moment and we’re working with community partners to ensure our resources do the most good.

Troy Farm

Population(s) Served:
K-12 (5-19 years) Multiracial people

Troy Farm is a vegetable production and education project of Rooted. Since 2001, the farm has been growing certified organic vegetables on Madison’s Northside since 2001.
RESULTS

Number of advisory councils the organization is a part of

<table>
<thead>
<tr>
<th>Population(s) Served: No target populations selected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Related program:</td>
</tr>
<tr>
<td>Notes: Members of our staff serve on the Madison Food Policy Council and the Dane County Food Council. The Councils are responsible for making local policy and regulatory recommendations on the food system.</td>
</tr>
</tbody>
</table>

Number of curricula designed

<table>
<thead>
<tr>
<th>TOTALS BY YEAR</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022</td>
</tr>
<tr>
<td>2021</td>
</tr>
<tr>
<td>2020</td>
</tr>
<tr>
<td>2019</td>
</tr>
<tr>
<td>2018</td>
</tr>
<tr>
<td>2017</td>
</tr>
</tbody>
</table>

Population(s) Served: No target populations selected

Related program:

Notes: We have designed curricula for all ages around home/school gardening, urban agriculture, and beginning farmer training.

Number of fiscal sponsor applicants sponsored

<table>
<thead>
<tr>
<th>TOTALS BY YEAR</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022</td>
</tr>
<tr>
<td>2021</td>
</tr>
<tr>
<td>2020</td>
</tr>
<tr>
<td>2019</td>
</tr>
</tbody>
</table>

Population(s) Served: No target populations selected

Related program:

Notes: We have served as fiscal sponsor for an international network of community land trusts. That group has since achieved its own 501c3 status.

Number of students educated through field trips

<table>
<thead>
<tr>
<th>TOTALS BY YEAR</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022</td>
</tr>
</tbody>
</table>

Population(s) Served: No target populations selected

Related program:

Notes: K12 students educated through field trips to one of our three educational farms/gardens.
CHARTING IMPACT

What is the organization aiming to accomplish?

Rooted evolved from a desire to merge the strengths of two vibrant Madison organizations—Center for Resilient Cities and Community GroundWorks—committed to enabling people to grow and thrive in healthy, equitable, and sustainable neighborhoods. We ground our work in collaborations rooted in food, land, and learning.

Ours is a firm commitment to building racial equity and inclusion and dismantling racism in our communities, in our education and food systems, in the environmental movement, and within our organization. This is a path of lifelong learning and commitment to action.

Rooted trains urban farmers and garden educators, while cultivating community through collaboration on Madison, WI's Northside (at our Troy Gardens location) and South Side (at our Badger Rock Neighborhood Center location). We operate Troy Farm, a 4-acre community-supported agriculture farm, and Badger Rock Urban Farm, a 2-acre educational farm, with weekly farmstands at each location. We also provide technical and administrative support to the Gardens Network of Madison and Dane County. rooted is home to the Wisconsin School Garden Network and Wisconsin Farm to Early Care and Education program.

What are the organization's key strategies for making this happen?

Our strategies for achieving our racial equity goals include:

1. Reviewing organization job descriptions to remove unintended barriers to employment based on level of education and experience.
2. Diversify our hires at all staff levels.
3. Create pathways to promotion from within.
4. Recruit and retain a diverse group of board members, including by race, ethnicity, gender, and sexual orientation.

What have and haven't they accomplished so far?

5% of each employee's FTE is allocated to racial and social capacity building work, including organizational affinity groups (BIPOC, white, white male, and queer groups have formed so far).

A staff-led Change Team has been established to review organizational practices and procedures, to make them more equitable. Team members have a total of 10% FTE allocated to this work. They are also supported in their work with technical assistance from staff from the YWCA of Madison.

Over the winter of 2021, staff participated in multi-session conflict resolution training, led by staff from the YWCA of Madison.

A budget line specific to the racial and social capacity building work has been included in the 2021 and 2022 budgets, over and above the standard professional development funds the organization includes in its budget.
Financials

FISCAL YEAR START: 01/01
FISCAL YEAR END: 12/31
✓ Financials audited by an independent accountant

Financials Quick View

<table>
<thead>
<tr>
<th>Financials Quick View Details</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total revenue, gains, and other support per audited financial statements</td>
<td>$916,495</td>
</tr>
<tr>
<td>Total expenses and losses per audited financial statements</td>
<td>$1,488,191</td>
</tr>
<tr>
<td>Surpluses in last 5 years</td>
<td>1</td>
</tr>
<tr>
<td>Negative Net Assets in past 5 years</td>
<td>0</td>
</tr>
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Financial Trends Analysis

Business Model Indicators

<table>
<thead>
<tr>
<th>Profitability</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted surplus (deficit) before depreciation</td>
<td>$105,638</td>
<td>$222,667</td>
<td>-$129,821</td>
<td>$1,108,864</td>
<td>-$392,410</td>
</tr>
<tr>
<td>As a % of expenses</td>
<td>18.8%</td>
<td>31.7%</td>
<td>-25.1%</td>
<td>77.7%</td>
<td>-26.9%</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Revenue Composition</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total revenue (unrestricted &amp; restricted)</td>
<td>$535,409</td>
<td>$437,569</td>
<td>$394,836</td>
<td>$2,689,987</td>
<td>$971,353</td>
</tr>
<tr>
<td>Total revenue, % change over prior year</td>
<td>-46.7%</td>
<td>-18.3%</td>
<td>-9.8%</td>
<td>581.3%</td>
<td>-63.9%</td>
</tr>
<tr>
<td>Program services revenue</td>
<td>35.8%</td>
<td>27.6%</td>
<td>33.5%</td>
<td>8.0%</td>
<td>25.0%</td>
</tr>
<tr>
<td>Membership dues</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Investment income</td>
<td>9.3%</td>
<td>11.5%</td>
<td>12.6%</td>
<td>1.6%</td>
<td>0.1%</td>
</tr>
<tr>
<td>Government grants</td>
<td>0.0%</td>
<td>29.4%</td>
<td>29.6%</td>
<td>14.2%</td>
<td>31.1%</td>
</tr>
<tr>
<td>All other grants and contributions</td>
<td>55.7%</td>
<td>32.0%</td>
<td>24.3%</td>
<td>76.2%</td>
<td>43.7%</td>
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<tr>
<td>Other revenue</td>
<td>-0.8%</td>
<td>-0.4%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.1%</td>
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</table>

<table>
<thead>
<tr>
<th>Expense Composition</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total expenses before depreciation</td>
<td>$562,695</td>
<td>$701,812</td>
<td>$516,392</td>
<td>$1,427,894</td>
<td>$1,461,407</td>
</tr>
<tr>
<td>Total expenses, % change over prior year</td>
<td>-48.6%</td>
<td>24.7%</td>
<td>-26.4%</td>
<td>176.5%</td>
<td>2.3%</td>
</tr>
<tr>
<td>Personnel</td>
<td>41.9%</td>
<td>28.4%</td>
<td>42.2%</td>
<td>54.4%</td>
<td>69.7%</td>
</tr>
<tr>
<td>Professional Fees</td>
<td>9.7%</td>
<td>8.8%</td>
<td>17.2%</td>
<td>8.3%</td>
<td>10.9%</td>
</tr>
<tr>
<td>Occupancy</td>
<td>11.9%</td>
<td>7.4%</td>
<td>9.3%</td>
<td>3.2%</td>
<td>6.3%</td>
</tr>
<tr>
<td>Interest</td>
<td>12.2%</td>
<td>9.8%</td>
<td>13.4%</td>
<td>6.9%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Pass-Through</td>
<td>14.2%</td>
<td>37.9%</td>
<td>9.1%</td>
<td>13.2%</td>
<td>0.2%</td>
</tr>
<tr>
<td>All other expenses</td>
<td>10.0%</td>
<td>7.6%</td>
<td>8.8%</td>
<td>14.0%</td>
<td>12.9%</td>
</tr>
</tbody>
</table>
## Financial Trends Analysis, continued

### Moving Toward Full Cost Coverage

<table>
<thead>
<tr>
<th>Full Cost Components (estimated)</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Expenses (after depreciation)</td>
<td>$562,695</td>
<td>$701,812</td>
<td>$516,676</td>
<td>$1,455,213</td>
<td>$1,488,191</td>
</tr>
<tr>
<td>One Month of Savings</td>
<td>$46,891</td>
<td>$58,484</td>
<td>$43,033</td>
<td>$118,991</td>
<td>$121,784</td>
</tr>
<tr>
<td>Debt Principal Repayment</td>
<td>$0</td>
<td>$59,702</td>
<td>$56,717</td>
<td>$399,426</td>
<td>$178,616</td>
</tr>
<tr>
<td>Fixed Asset Additions</td>
<td>$0</td>
<td>$0</td>
<td>$3,407</td>
<td>$137,451</td>
<td>$33,118</td>
</tr>
<tr>
<td>Total Full Costs (estimated)</td>
<td>$609,586</td>
<td>$819,998</td>
<td>$619,833</td>
<td>$2,111,081</td>
<td>$1,821,709</td>
</tr>
</tbody>
</table>

### Capital Structure Indicators

#### Liquidity

<table>
<thead>
<tr>
<th></th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Months of cash</td>
<td>4.7</td>
<td>2.5</td>
<td>2.7</td>
<td>32.0</td>
<td>25.4</td>
</tr>
<tr>
<td>Months of cash and investments</td>
<td>4.7</td>
<td>2.5</td>
<td>2.7</td>
<td>32.0</td>
<td>25.4</td>
</tr>
<tr>
<td>Months of estimated liquid unrestricted net assets</td>
<td>56.6</td>
<td>49.2</td>
<td>63.8</td>
<td>30.5</td>
<td>26.3</td>
</tr>
</tbody>
</table>

#### Balance Sheet Composition

<table>
<thead>
<tr>
<th></th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash</td>
<td>$220,198</td>
<td>$148,862</td>
<td>$116,863</td>
<td>$3,805,540</td>
<td>$3,096,463</td>
</tr>
<tr>
<td>Investments</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Receivables</td>
<td>$5,583,999</td>
<td>$5,297,454</td>
<td>$5,216,675</td>
<td>$166,440</td>
<td>$162,939</td>
</tr>
<tr>
<td>Gross land, buildings, and equipment (LBE)</td>
<td>$113,003</td>
<td>$88,200</td>
<td>$116,410</td>
<td>$251,373</td>
<td>$284,491</td>
</tr>
<tr>
<td>Accumulated depreciation (% of LBE)</td>
<td>21.9%</td>
<td>0.0%</td>
<td>21.6%</td>
<td>19.9%</td>
<td>27.0%</td>
</tr>
<tr>
<td>Liabilities (as % of LBE)</td>
<td>46.2%</td>
<td>47.5%</td>
<td>48.5%</td>
<td>5.6%</td>
<td>1.5%</td>
</tr>
<tr>
<td>Unrestricted net assets</td>
<td>$2,655,043</td>
<td>$2,877,710</td>
<td>$2,747,605</td>
<td>$3,829,150</td>
<td>$3,409,956</td>
</tr>
<tr>
<td>Temporarily restricted net assets</td>
<td>$492,400</td>
<td>$3,029</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Permanently restricted net assets</td>
<td>$88,200</td>
<td>$88,200</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Total restricted net assets</td>
<td>$580,600</td>
<td>$91,229</td>
<td>$116,308</td>
<td>$243,535</td>
<td>$169,159</td>
</tr>
<tr>
<td>Total net assets</td>
<td>$3,235,643</td>
<td>$2,968,939</td>
<td>$2,863,913</td>
<td>$4,072,685</td>
<td>$3,579,115</td>
</tr>
</tbody>
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### Key Data Checks

<table>
<thead>
<tr>
<th>Material Data Errors</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
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<tbody>
<tr>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

Note: This issue is relevant to a small number of organizations: The nonprofit subject(s) of this report may have affiliates. The Form 990 data may not include information about any or all potential affiliates. If an organization does have affiliates and these affiliates have substantial financial activity, the financial data in this report may not present a comprehensive picture of the nonprofit's financial condition. Please consult the 990s of any potentially related affiliates for additional information.

- [Formulas for key metrics](#)
- [Key Revenue & Expense Data from Form 990](#)
- [Key Balance Sheet Data from Form 990](#)
Operations

Source: Self-Reported by Organization, February 2023

**EXECUTIVE DIRECTOR**

Marcia Caton Campbell PhD

Marcia Caton Campbell (MCRP, PhD, The Ohio State University; BA, University of Illinois) is Rooted's Executive Director. Marcia is a city and regional planner who has worked on community and regional food systems planning, policy, and development for over twenty years. Marcia is co-author of Urban Agriculture: Growing Healthy, Sustainable Places (American Planning Association, 2011) with Kimberley Hodgson and Martin Bailkey. She was the 2020 recipient of the Community Shares of Wisconsin Sally Sunde Family Advocate Award. Prior to joining the organization, Marcia was on the urban and regional planning faculty at the University of Wisconsin-Madison and was affiliate faculty at the university’s Nelson Institute for Environmental Studies. She is a member of the American Planning Association Food Division (APA-FOOD) Executive Committee.

**DEPUTY DIRECTOR OF OPERATIONS**

Ginny Hughes

Ginny Hughes serves as Rooted’s Deputy Director. Before joining the staff in 2012, Ginny earned a master’s degree in Environmental Leadership from Naropa University in Boulder, Colorado. She has over a decade of experience sharing her love of growing vegetables with kids and adults in a variety of settings. When she's not in the garden, she enjoys yoga and adventuring outdoors with her two sons and husband.

**NUMBER OF EMPLOYEES**

Source: IRS Form 990

**BOARD CHAIR**

Joe Sensenbrenner

Former Mayor, City of Madison, WI

Term: 2020 - 2023

**BOARD MEMBERS**

Joe Sensenbrenner

Former Mayor, City of Madison, WI

Brigid Elliott-Boger

Partner, Baker Tilly Virchow Krause

Jim Bradley

President, Home Savings Bank

Nicholas Hayes

Co-Founder and CTO, Wellntel

Harold “Hal” Mayer

Retired Vice President Operations, Oscar Mayer/Kraft Foods

Deirdre Garton

Attorney (retired)

Mary Ellyn Sensenbrenner

Attorney (retired)
## OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

**FISCAL YEAR 2021**

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Compensation</th>
<th>Other</th>
<th>Related</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marcia Caton Campbell</td>
<td>EXECUTIVE DIRECTOR</td>
<td>$97,885</td>
<td>$979</td>
<td>$0</td>
</tr>
<tr>
<td>Joe Sensenbrenner</td>
<td>PRESIDENT</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Brigid Elliott-Boger</td>
<td>TREASURER</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Nicholas Hayes</td>
<td>SECRETARY</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Jim Bradley</td>
<td>VICE PRESIDENT</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Benjamin Futa</td>
<td>DIRECTOR</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Deirdre Garton</td>
<td>DIRECTOR</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Hal Mayer</td>
<td>DIRECTOR</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Mary Ellen Sensenbrenner</td>
<td>DIRECTOR</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
</tbody>
</table>
# OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

## FISCAL YEAR 2020

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Compensation</th>
<th>Other</th>
<th>Related</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marcia Caton Campbell</td>
<td>EXECUTIVE DIRECTOR</td>
<td>$57,127</td>
<td>$33,273</td>
<td>$0</td>
</tr>
<tr>
<td>Joe Sensenbrenner</td>
<td>PRESIDENT</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Brigid Elliott-Boger</td>
<td>TREASURER</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Nicholas Hayes</td>
<td>SECRETARY</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Jim Bradley</td>
<td>VICE PRESIDENT</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Benjamin Futa</td>
<td>DIRECTOR</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Deirdre Garton</td>
<td>DIRECTOR</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
</tbody>
</table>
## OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

### FISCAL YEAR 2019

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Compensation</th>
<th>Other</th>
<th>Related</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marcia Caton Campbell</td>
<td>EXECUTIVE DIRECTOR</td>
<td>$76,885</td>
<td>$2,307</td>
<td>$0</td>
</tr>
<tr>
<td>Joe Sensenbrenner</td>
<td>PRESIDENT</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Brigid Elliott-Boger</td>
<td>TREASURER</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Nicholas Hayes</td>
<td>SECRETARY</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Jim Bradley</td>
<td>DIRECTOR</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Hal Mayer</td>
<td>DIRECTOR</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Ananda Mirilli</td>
<td>DIRECTOR</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Lisa Peyton-Caire</td>
<td>DIRECTOR</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
</tbody>
</table>
## OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES
### FISCAL YEAR 2018

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Compensation</th>
<th>Other</th>
<th>Related</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marcia Caton Campbell</td>
<td>EXECUTIVE DIRECTOR</td>
<td>$69,117</td>
<td>$2,074</td>
<td>$0</td>
</tr>
<tr>
<td>Joe Sensenbrenner</td>
<td>PRESIDENT</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Brigid Elliott-Boger</td>
<td>TREASURER</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Nicholas Hayes</td>
<td>SECRETARY</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Jim Bradley</td>
<td>DIRECTOR</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Hal Mayer</td>
<td>DIRECTOR</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Ananda Mirilli</td>
<td>DIRECTOR</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Lisa Peyton-Caire</td>
<td>DIRECTOR</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
</tbody>
</table>
### OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

#### FISCAL YEAR 2017

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Compensation</th>
<th>Other</th>
<th>Related</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marcia Caton Campbell</td>
<td>EXECUTIVE DIRECTOR</td>
<td>$88,679</td>
<td>$2,660</td>
<td>$0</td>
</tr>
<tr>
<td>Joe Sensenbrenner</td>
<td>PRESIDENT</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Brigid Elliott-Boger</td>
<td>TREASURER</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Jim Bradley</td>
<td>DIRECTOR</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Nicholas Hayes</td>
<td>DIRECTOR</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Harold Mayer</td>
<td>DIRECTOR</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Ananda Mirilli</td>
<td>DIRECTOR</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Lisa Peyton-Caire</td>
<td>DIRECTOR</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
</tbody>
</table>
# Paid Preparers

## FISCAL YEAR 2021

<table>
<thead>
<tr>
<th>Firm Name</th>
<th>Firm EIN</th>
<th>Firm Address</th>
<th>Firm Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>WEGNER CPAS LLP</td>
<td>390974031</td>
<td>2921 LANDMARK PL STE 300, MADISON WI 537134236</td>
<td>6082744020</td>
</tr>
</tbody>
</table>

## FISCAL YEAR 2020

<table>
<thead>
<tr>
<th>Firm Name</th>
<th>Firm EIN</th>
<th>Firm Address</th>
<th>Firm Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>WEGNER CPAS LLP</td>
<td>39-0974031</td>
<td>2921 LANDMARK PL STE 300, MADISON WI 537134236 USA</td>
<td>608-274-4020</td>
</tr>
</tbody>
</table>

## FISCAL YEAR 2019

<table>
<thead>
<tr>
<th>Firm Name</th>
<th>Firm EIN</th>
<th>Firm Address</th>
<th>Firm Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>WEGNER CPAS LLP</td>
<td>39-0974031</td>
<td>2921 LANDMARK PL STE 300, MADISON WI 537134236 USA</td>
<td>608-274-4020</td>
</tr>
</tbody>
</table>


**BOARD LEADERSHIP PRACTICES**

GuideStar worked with BoardSource, the national leader in nonprofit board leadership and governance, to create this section, which enables organizations and donors to transparently share information about essential board leadership practices.

<table>
<thead>
<tr>
<th><strong>BOARD ORIENTATION &amp; EDUCATION</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Does the board conduct a formal orientation for new board members and require all board members to sign a written agreement regarding their roles, responsibilities, and expectations?</td>
<td>Yes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>CEO OVERSIGHT</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Has the board conducted a formal, written assessment of the chief executive within the past year?</td>
<td>Yes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>ETHICS &amp; TRANSPARENCY</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Have the board and senior staff reviewed the conflict-of-interest policy and completed and signed disclosure statements in the past year?</td>
<td>Yes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>BOARD COMPOSITION</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Does the board ensure an inclusive board member recruitment process that results in diversity of thought and leadership?</td>
<td>Yes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>BOARD PERFORMANCE</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Has the board conducted a formal, written self-assessment of its performance within the past three years?</td>
<td>No</td>
</tr>
</tbody>
</table>
Organizational Demographics

Who works and leads organizations that serve our diverse communities? This organization has voluntarily shared information to answer this important question and to support sector-wide learning. GuideStar partnered on this section with CHANGE Philanthropy and Equity in the Center.

Leadership

The organization’s co-leader identifies as:

<table>
<thead>
<tr>
<th>Race &amp; Ethnicity</th>
<th>White/Caucasian/European</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender Identity</td>
<td>Female, Not transgender (cisgender)</td>
</tr>
<tr>
<td>Sexual Orientation</td>
<td>Heterosexual or Straight</td>
</tr>
<tr>
<td>Disability Status</td>
<td>Person without a disability</td>
</tr>
</tbody>
</table>

The organization’s other co-leader identifies as:

<table>
<thead>
<tr>
<th>Race &amp; Ethnicity</th>
<th>White/Caucasian/European</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender Identity</td>
<td>Female, Not transgender (cisgender)</td>
</tr>
<tr>
<td>Sexual Orientation</td>
<td>Heterosexual or Straight</td>
</tr>
<tr>
<td>Disability Status</td>
<td>Person without a disability</td>
</tr>
</tbody>
</table>

Race & Ethnicity

<table>
<thead>
<tr>
<th>Status</th>
<th>Board Members</th>
<th>Staff</th>
<th>Senior Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>White/Caucasian/European</td>
<td>7</td>
<td>22</td>
<td>4</td>
</tr>
<tr>
<td>Asian/Asian American</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Black/African American</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Hispanic/Latino/Latina/Hispanic</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Middle Eastern/North African</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Native American/American Indian/Alaska</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Native Hawaiian/Pacific Islander</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>White/Caucasian/European</td>
<td>100%</td>
<td>77%</td>
<td>0%</td>
</tr>
<tr>
<td>Multi-Racial/Multi-Ethnic (2+ races/ethnicities)</td>
<td>0%</td>
<td>0%</td>
<td>26%</td>
</tr>
<tr>
<td>People who prefer to identify with another race or ethnicity</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Unknown or decline to state</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Gender Identity

<table>
<thead>
<tr>
<th>Status</th>
<th>Board Members</th>
<th>Staff</th>
<th>Senior Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female</td>
<td>4%</td>
<td>66%</td>
<td>76%</td>
</tr>
<tr>
<td>Male</td>
<td>27%</td>
<td>36%</td>
<td>24%</td>
</tr>
<tr>
<td>Non-binary</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Unknown or decline to state</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Status</th>
<th>Board Members</th>
<th>Staff</th>
<th>Senior Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transgender</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Not transgender (cisgender)</td>
<td>100%</td>
<td>91%</td>
<td>100%</td>
</tr>
<tr>
<td>Unknown or decline to state</td>
<td>0%</td>
<td>9%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Sexual Orientation

<table>
<thead>
<tr>
<th>Status</th>
<th>Board Members</th>
<th>Staff</th>
<th>Senior Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gay, Lesbian, Bisexual</td>
<td>0%</td>
<td>18%</td>
<td>26%</td>
</tr>
<tr>
<td>Heterosexual or Straight</td>
<td>100%</td>
<td>62%</td>
<td>75%</td>
</tr>
<tr>
<td>Unknown or decline to state</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Disability

<table>
<thead>
<tr>
<th>Status</th>
<th>Board Members</th>
<th>Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>Person with a disability</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>Person without a disability</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Unknown or decline to state</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>
Equity Strategies  Last Updated: 05/29/2021

Candid partnered with Equity in the Center - a project that works to shift mindsets, practices, and systems within the social sector to increase racial equity - to create this section. Learn More

Data

✓ We review compensation data across the organization (and by staff levels) to identify disparities by race.

✓ We ask team members to identify racial disparities in their programs and/or portfolios.

✓ We analyze disaggregated data and root causes of race disparities that impact the organization's programs, portfolios, and the populations served.

✓ We disaggregate data to adjust programming goals to keep pace with changing needs of the communities we support.

✓ We employ non-traditional ways of gathering feedback on programs and trainings, which may include interviews, roundtables, and external reviews with/by community stakeholders.

Policies and processes

✓ We use a vetting process to identify vendors and partners that share our commitment to race equity.

✓ We have a promotion process that anticipates and mitigates implicit and explicit biases about people of color serving in leadership positions.

✓ We seek individuals from various race backgrounds for board and executive director/CEO positions within our organization.

✓ We have community representation at the board level, either on the board itself or through a community advisory board.

✓ We help senior leadership understand how to be inclusive leaders with learning approaches that emphasize reflection, iteration, and adaptability.

✓ We engage everyone, from the board to staff levels of the organization, in race equity work and ensure that individuals understand their roles in creating culture such that one's race identity has no influence on how they fare within the organization.
# Appendix

## Key Documents

### IRS Forms 990

- 2021 990
- 2020 990
- 2019 990
- 2018 990
- 2017 990

### IRS Forms 990T

Not Available

### Audited Financial Statements

- 2021 Audited Financial Statement
- 2020 Audited Financial Statement
- 2019 Audited Financial Statement

### Key Organization Documents

- Letter of Determination
- 2022 Annual Report
- 2021 Annual Report
- 2020 Annual Report
- 2016 Annual Report
- 2014 Annual Report
- Key Revenue & Expense Data from Form 990
- Key Balance Sheet Data from Form 990
ROOTED WI, INC.

Aka Rooted
2702 International Lane, Suite 200
Madison, WI 53704

✔ Foundation Status Code: PC*
✔ Public charity described in section 509(a)(1) or (2)

IRS Publication 78 Details

<table>
<thead>
<tr>
<th>Organization name</th>
<th>Location</th>
<th>Most recent IRS Publication 78</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rooted Wi Inc.</td>
<td>Madison, WI</td>
<td>July 2023</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EIN</th>
<th>Deductibility status description</th>
</tr>
</thead>
<tbody>
<tr>
<td>39-1854762</td>
<td>A public charity (50% deductibility limitation).</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Most recent IRS Publication 78</th>
<th>Verified with most recent Internal Revenue Bulletin</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>July 24, 2023</td>
</tr>
</tbody>
</table>

IRS Business Master File Details

<table>
<thead>
<tr>
<th>Organization name</th>
<th>Most recent IRS BMF</th>
<th>Reason for Non-Private Foundation Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>ROOTED WI INC</td>
<td>July 10 2023</td>
<td>Section 509(a)(1) organization as referred to in Section 170(b)(1)(A)(vi)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EIN</th>
<th>IRS subsection</th>
<th>Ruling date</th>
</tr>
</thead>
<tbody>
<tr>
<td>39-1854762</td>
<td>This organization is a 501(c)(3) Public Charity</td>
<td>10/1996</td>
</tr>
</tbody>
</table>

This organization was not included in the Office of Foreign Assets Control Specially Designated Nationals (SDN) list.

On September 8, 2011, the IRS issued [regulations](https://www.irs.gov) which eliminated the advance ruling process for a section 501(c)(3) organization. [Learn more](https://www.irs.gov/)

* The Foundation Status Code is the code that foundations are required to provide for each grantee annually on part XV of Form 990PF. Note that this code cannot be derived in some cases (e.g., supporting organizations for which 'type' can't be determined).

IRS Revenue Procedure 2011-33 allows grantors to rely on third-party resources, such as GuideStar Charity Check, to obtain required Business Master File (BMF) data concerning a potential grantee's public charity classification under section 509 (a) (1), (2) or (3).

GuideStar Charity Check Data Sources

- GuideStar acquires all IRS data directly from the Internal Revenue Service.
- IRS Publication 78 (Cumulative List of Organizations) lists organizations that have been recognized by the Internal Revenue Service as eligible to receive tax-deductible contributions.
- The IRS Internal Revenue Bulletin (IRB) lists changes in charitable status since the last Publication 78 release. Between the release of IRS Publication 78 and the subsequent IRS Internal Revenue Bulletin, the IRB date will reflect the most recent release date of IRS Publication 78.
- The IRS Business Master File lists approximately 1.7 million nonprofits registered with the IRS as tax-exempt organizations.
- The IRS Automatic Revocation of Exemption List contains organizations that have had their federal tax-exempt status automatically revoked for failing to file an annual return or notice with the IRS for three consecutive years.
- The Foundation Status Code is a value derived by mapping the codes found on the 990PF filing instructions to the corresponding codes in the IRS BMF. Note that not all codes are able to be mapped due to insufficient data.
- The Office of Foreign Assets Control (OFAC) Specially Designated Nationals (SDN) list contains organizations that are owned or controlled by targeted individuals, groups, and entities, such as terrorists or narcotics traffickers. Their assets are blocked and U.S. persons are generally prohibited from dealing with them.

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