



Racial Equity Assessment & Strategy Roadmap

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Prepared by Diara Parker | EQT By Design



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Introduction

Overview

In Spring 2020, Rooted engaged in a consulting partnership with EQT By Design (EQT) to co-create an organizational strategic plan centered around equity and inclusion. The purpose of this strategic planning process was to support Rooted in further developing an inclusive and equitable culture in both practice and design. More specifically, EQT's framework process design centered around developing a strategic plan that ultimately answered the following focus question:

How can we work together to create and maintain a more diverse, inclusive, equitable organization?

In answering this question, EQT - in collaboration with the Rooted Strategy Planning Team - led Rooted staff through a series of surveys and interactive, consensus-based workshops, each addressing a specific component of this larger focus question. After completing this organizational assessment, EQT developed a strategy roadmap for further embedding and operationalizing racial justice within Rooted's policies, practices, programs, and systems.

This report was designed to share the findings of EQT's assessment and recommendations for Rooted to review and use to determine next steps in their organizational equity and inclusion journey.

EQT Framework Design

EQT's framing for creating inclusive and equity-centered environments is based on the premise that capacity, climate, culture, and context are fundamental to developing these spaces. Our framework includes:

- A **Vision** necessary to describe what an equitable and inclusive organization should offer and be as experienced by staff, clients, and community.
- **Language** in place to guide and empower communication for staff, clients, and community to learn, develop, and practice a culture of equity and inclusion.
- A **Learning** culture that reflects an environment cultivated to foster a culture of equity and inclusion.

- **Support** for staff and other organizational constituents from leadership, policy, and training systems to actively develop how the organization practices equity and inclusion.
- A **Strategic Plan** that incorporates an equity lens and provides recommendations for implementing a change management strategy that embeds equity and inclusion.

Following is a summary of EQT's assessment and recommendations for how Rooted can more deeply embed and reflect racial equity and justice within its infrastructure and operations. While this report is comprehensive and will require additional investment to lead to success, EQT has staged the recommendations according to greatest impact, as indicated by our phased implementation approach. Next steps require bringing key internal stakeholders together to:

1. Review and digest this report;
2. Identify specific action items and resources needed to accomplish the outlined strategies and roadmap implementation goals (see [Appendix E](#) for a project planning template); and
3. Mobilize with a definitive path forward for 2020 and beyond.

Executive Summary

EQT Process Design

EQT was invited to support Rooted in further embedding and operationalizing racial justice within its organizational and programmatic policies, practices, and systems. With this in mind, EQT used a specific process design to guide Rooted through the strategic planning process (see Figure 1 below). More specifically:

- The **Environmental Scanning** stage focused on identifying the organizational truths, accomplishments, strengths, and opportunity areas Rooted needs to consider throughout the development and implementation of its strategic plan.
- **Visioning** and **Barrier Examination** helped Rooted staff envision what they wanted to see as a result of their actions to create and maintain a more diverse, inclusive, equitable organization, as well as name and examine the real barriers that could block them from moving toward that vision.
- Finally, within the **Strategy Development** and **Roadmap Development** stages, EQT developed a series of sequenced recommendations for Rooted to consider in its efforts.

Figure 1. EQT Framework + Design



Key Observations + Considerations

As a result of this process design, EQT identified the following key observations and considerations related to Rooted's equity and inclusion strategy.

1. Rooted is a **primarily white and white-centered** organization. This means that additional external support may be needed to ensure this white-lens isn't being centered as the organization's default. This will also be critical to ensuring the burden of Rooted's equity and inclusion work isn't being placed on the few BIPOC (Black, Indigenous, People of Color) staff within the organization.
2. **Staff are deeply committed** to building an organizational culture centered around inclusion, equity, and justice despite their busy schedules and high workloads.
3. Opportunities exist to **build and incorporate supports** that create additional systems, structures, protocols and language to further racial equity work. The creation of and work within the Change Team has created a great foundation, but additional infrastructure will be needed to ensure the Change Team is fully equipped to support the organization through this work.
4. The **non-profit industrial complex** forces Rooted to play small and places significant strain on staff positions, capacity, and flexibility.
5. Staff need and want to **build stronger connections** with one another, as well as with the community, but staff capacity to engage in these community-building activities is limited by Rooted's current funding streams / budget allocations and is inconsistent across programs.

Key Findings + Recommendations

Operationalizing Racial Justice

Leveraging these observations and considerations, EQT's proposed strategy framework provides a series of recommendations to address identified barriers, move Rooted toward its vision, and ultimately support the organization in operationalizing racial justice.

Operationalizing racial justice requires three key strategy practices:

1. Centering **BIPOC voices** in processes and decision-making;
2. Examining and addressing the ways in which **white supremacy and white culture** are centered throughout and within the organization's structure, practices, protocols,

systems, and people; and

3. Employing organizational transformation centered around **relationship-building, community, and collective power.**

Centering these racial equity practices will be critical to Rooted’s strategy roadmap implementation success.

Creating a Strategy Roadmap

To maximize impact, EQT recommends dividing Rooted’s strategies into two segments - *Building Our Foundation* and *Deepening Our Work* (see Figure 2 below).

Figure 2. Strategy Roadmap: A Phased Approach



Phase 1 focuses on building staff cohesion and improving Rooted’s capacity around organizational infrastructure, learning, and finances. In addition to helping lay the foundation for Rooted’s racial equity and justice work, many of the recommendations presented in Phase 1 highlight work Rooted staff can lead without additional external support. More information can be found in the [Phase 1 Strategy Roadmap section](#).

Phase 2 complements Phase 1 by encouraging Rooted to take a deeper dive into its equity and inclusion work and expanding on the foundation built within the identified focus areas. Unlike

Phase 1, EQT recommends Rooted seek external support for many of the recommendations provided in Phase 2. More information can be found in the [Phase 2 Strategy Roadmap section](#).

Successfully engaging in a strong racial equity organizational process takes time. Following this phased approach will ensure Rooted continues to build its capacity to reflect and embed racial equity ideologies and practices within its organizational infrastructure, as well as its externally-facing collaborations.

Operationalizing Accountability

Finally, as Rooted deepens its racial equity work, it will be important to develop practices and tools to assess the organization's progress and support accountability measures. These strategies include:

- Assessing the **power index of BIPOC staff** as it relates to funding, organizational structure and power, programming, and human resources practices;
- Developing a **Community Voicing program** that recruits and compensates diverse community members (including youth) to directly inform and be an integral part of Rooted programmatic and organizational decisions;
- Implementing **consistent, internal feedback mechanisms** that assess whether or not staff feel safe, valued, and supported; and
- Creating and utilizing the **Strategy Work Team project plans** to monitor strategy roadmap implementation progress.

These accountability tools will be critical to ensuring Rooted remains on its journey to create and maintain a more diverse, inclusive, equitable organization that centers racial equity and justice.

Following is a summary of EQT's assessment and data analysis, as well as proposed strategy roadmap.

Assessment + Data Analysis



Background

Merger Impact

From a historical perspective, equity and inclusion have been important aspects of Rooted’s work, and the 2019 merge of Community GroundWorks (CGW) and Center for Resilient Cities (CRC) provided an opportunity for Rooted to integrate and center equity and inclusion more comprehensively at both an organizational and programmatic level. Following this merger, Rooted began working with the YWCA and created an internal Change Team, which has been leading the organization’s equity and inclusion work thus far.

Mission, Vision, and Values

In 2019, Rooted also engaged in a rebranding process, which included the assessment and redevelopment of their mission, vision, and values (see Table 3 below). These changes not only provided an opportunity for Rooted to externally share its identity as a new, merged entity, it also further solidified its commitment to racial equity work. Furthermore, these organizational guideposts played a key role in framing the context and setting the stage for EQT’s strategic planning work with Rooted. Key components of Rooted’s mission, vision, and values used within EQT’s framework and design process are noted in bold in Table 1 below.

Table 1. Rooted Mission, Vision, and Values

Mission Statement	Collaborations rooted in food, land, and learning.
Vision Statement	People growing and thriving in healthy, equitable, and sustainable communities.
Values	<ul style="list-style-type: none">● 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.● The community will always drive our work. The community tells us the focus and determines the path forward. Ownership of this work, and the power inherent in it, resides within the community and does not belong to our organization or its leaders. We will not act as heroes or saviors.● We provide access to resources, such as space, land with tenure, expertise,

hands-on education in the field, programming and food, and work every day to **offer these resources to more people who have been excluded from accessing them**, especially people of color.

- We blend community members' expertise and local knowledge with our technical knowledge to **achieve the community's vision for its future**.
- We acknowledge our privilege. **We use it to work the levers of power** so those people historically excluded can access them and take leadership. In so doing, we step up to step back and get out of the way so the community may lead.
- We see the **diversity of peoples and perspectives in our communities as one of our greatest assets**. We work to foster true collaboration through respectful, authentic engagement of all stakeholders.
- We believe the systems we're working to change (food, housing, education, environmental sustainability, social ecology, etc.) are interconnected, and our work reflects this holistic understanding. This holistic understanding underpins everything we do and we believe it is the only **path toward equitable and just community resilience**.
- We believe open, green spaces must be held in trust, now and for future generations to roam free and cultivate the soil. We believe this is part and parcel of **attaining true racial equity and social justice**. We work to preserve land for these purposes and increase access to that land.
- We believe **people must have access** to the means of production of their food. This means stable access to land, knowledge, tools, farmers and fresh produce.
- We share in the **collective responsibility** to steward and protect our planet and work to mitigate the impacts of climate change upon people and places.

This historical context was key in setting the stage for EQT's strategic planning work with Rooted.

Environmental Scanning

To begin the strategic planning process, all Rooted staff were invited to engage in identifying the organizational truths, accomplishments, strengths and opportunity areas that would be central to developing Rooted’s strategic plan. EQT also analyzed data provided by both the Change Team and leadership team to complete this stage.

Each Environmental Scanning focus area centered on a specific reflection question:

- **Organizational Truths** - *What are some truths / objective facts that reveal our current situation (e.g. demographics, statistics, geography, organizational structure, staff schedules, etc.)?*
- **Accomplishments** - *What are our organization’s accomplishments related to equity and inclusion work?*
- **Strengths** - *What strengths / advantages do we have as it relates to equity and inclusion work?*
- **Opportunity Areas** - *What opportunity areas (improvements) exist around furthering equity and inclusion work? Where can we improve and strengthen our impact?*

Highlights from EQT’s Environmental Scanning assessment are illustrated in Table 2 below. The full Environmental Scanning data summary can be found in [Appendix A](#).

Table 2. Environmental Scanning Assessment Highlights

<p>Organizational Truths</p>	<ul style="list-style-type: none"> ● Rooted is a primarily white and white-centered organization, which is juxtaposed with the fact that it primarily works with non-white youth and land resources are within diverse neighborhoods. ● Rooted exists within the context of systemic racism and has many moving parts and programs supported by several funding sources. ● COVID-19 has impacted Rooted’s day-to-day work, which in turn impacts staff’s capacity to navigate their individual and collective workloads.
<p>Accomplishments</p>	<ul style="list-style-type: none"> ● The 2019 merge of CGW and CRC provided many opportunities for Rooted to expand both its programming and commitment to

	<p>equity and inclusion work.</p> <ul style="list-style-type: none"> ● Rooted formed the YWCA Equitable Organizations Change Team, as well as engaged in a rebranding and website redevelopment process to further solidify their newly formed identity as one, cohesive entity. ● Rooted leadership, staff, and board are committed to more intentionally embedding equity and inclusion within its programming and infrastructure..
<p>Strengths</p>	<ul style="list-style-type: none"> ● Rooted staff agree that the organization has an overall positive work environment with friendly, interesting, and passionate team members. ● Rooted programming is creative, innovative, and a direct reflection of the expansive knowledge and expertise of staff, as well as staff’s expansive community networks across the state.
<p>Opportunity Areas</p>	<p>Rooted’s opportunity areas fall within three main categories:</p> <ul style="list-style-type: none"> ● <i>Communication + Collaboration</i> ● <i>Staff + Programs</i> ● <i>Human Resources</i> <p>These categories highlight opportunities to improve coordination and operational consistency across programs, build opportunities for more staff to deepen their relationships with the community, and examine Rooted’s organizational structure and policies through an equity lens.</p>

These organizational truths, accomplishments, strengths, and opportunity areas serve as the foundation for the realities Rooted will need to continue updating and considering throughout their equity and inclusion journey.

Visioning

After completing the Environmental Scanning process, EQT led Rooted staff through the Visioning stage, which centered around the following question:

What do we want to see as a result of our actions to create and maintain a more diverse, inclusive, equitable organization?

Similar to Environmental Scanning, EQT used live feedback from staff, as well as leveraged historical documentation from both the Change Team and leadership team, to develop Rooted’s final vision. EQT identified seven key visioning areas, which are summarized in Table 3 below. The full Visioning data summary can be found in [Appendix B](#).

Table 3. Visioning Assessment Highlights

1. Community-driven internal change management efforts
2. Open, inclusive, supportive organizational culture centered around accountability
3. Enhanced, inclusive recruiting, hiring, and retention processes, protocols, and practices
4. Improved collaborations with equity-centered funders and community partners
5. Decreased reliance on traditional funding streams
6. Equitable and culturally-responsive staff training and supports
7. Consistent, responsive feedback mechanisms

These key visioning areas represent the ideologies and practices Rooted will strive to embody as a result of its work to create and maintain a more diverse, inclusive, equitable organization.

Barrier Examination

Barrier Examination is the final area EQT assessed in preparation for strategy roadmap development. Barrier Examination is a critical component of strategic planning, particularly as it relates to racial equity and justice. This stage encourages organization’s to deeply examine the barriers and underlying contradictions that, if unaddressed, have the potential to block movement toward their vision. More specifically, Barrier Examination asks:

What is blocking us from moving toward our vision?

EQT identified seven barriers that should be considered and addressed throughout Rooted’s journey (see Table 4 below). The complete Barrier Examination data summary can be found in [Appendix C](#).

Table 4. Barrier Examination Assessment Highlights

COVID-19 creates challenges for Rooted staff in balancing a seemingly constant sense of urgency with the time and space needed to process and plan.	
Funding Streams	Traditional funding streams and partnerships limit relationship-building opportunities and maintain the status quo.
Organizational Culture + Values	A white-centered environment and practices limit opportunities to create an inclusive culture and inclusion-centered partnerships.
Community Engagement + Relationship-building	Disjointed connections with and understanding of “community” restrict consistent external engagement and relationship-building efforts across programs.
Hiring, Onboarding + Training	Restrictive hiring practices, inconsistent onboarding processes, and limited ongoing training opportunities create barriers for developing a diverse team and providing adequate professional development support for staff.
Merger + Communications	Inconsistent communication and the recent merger create barriers to developing a shared understanding of Rooted’s history, as well as key organizational knowledge and partnerships.
Staff + Programs	Staff turnover and differing program cultures and workloads restrict internal relationship-building opportunities and overall staff capacity.

Strategy Roadmap



Phase 1: Building Our Foundation

The following section highlights the first phase of Rooted’s strategy roadmap, which focuses on building staff cohesion and improving Rooted’s capacity around organizational infrastructure, learning, and finances. Phase 1 is divided into five core strategy focus areas, which are displayed in Table 5 below.

Table 5. Phase 1 Strategy Focus Areas

<ol style="list-style-type: none">1. Implementation Infrastructure + Support2. Internal Relationship-building + Communication<ol style="list-style-type: none">a. Accountability + Conflict Resolution (Segment 1)*3. Learning Culture + Ongoing Engagement (Segment 1)*4. Short-term Budget + Funding

**Represents focus areas that are divided into multiple segments. Segment 1 is outlined in Phase 1 and Segment 2 serves as a continuation of Segment 1 and is outlined in Phase 2.*

1. Implementation Infrastructure + Support

Build additional infrastructural support for leadership, staff, and board members to engage in, communicate about, and implement strategic initiatives around racial equity and justice.

Key Observations + Considerations
<ul style="list-style-type: none">● The Change Team has begun developing a strong foundation for Rooted’s racial equity work.● Rooted has a newly formed BIPOC affinity group.● BIPOC staff carry both the burden of organizational racism and systemic inequities, as well as the burden of their white peers working through racial equity work.

- Rooted staff and board are committed to strengthening the organization’s internal and external racial equity work.
- Staff capacity and scheduling will play a significant role in the success of this focus area.

Recommendations

1. In addition to the newly formed BIPOC affinity group, develop a white affinity group so both BIPOC and white staff have a space to intentionally process and discuss their respective roles within Rooted’s racial equity work. These caucus groups will serve as an addition to integrated work teams / groups.
2. Examine the Change Team’s authority and decision-making autonomy and ensure the Change Team’s sphere of influence is explicit and equips them to effectively lead Rooted’s racial equity work. This includes:
 - Ensuring Change Team participation is captured on Change Team members’ position descriptions.
 - Ensuring pay equity so that members of the Change Team are being compensated and appropriately recognized for their additional role and responsibilities.
 - Providing the Change Team with ongoing external coaching and professional development support to further their work.
3. Create an internal resource accessible to all staff that holds information on the organization’s racial equity work.
4. Begin preliminary development of strategy work teams consisting of staff across all organizational levels and departments. These work teams will be heavily leveraged throughout the roadmap implementation process in both Phase 1 and 2. More information about Rooted’s work teams can be found in the [Strategy Work Team Development section](#) of Phase 2.

Reflection Questions

- *What internal and external resources do each of the affinity groups need to be successful and feel supported?*
- *What are the goals, responsibilities, and accountability measures (if applicable) for these affinity groups?*

- *Are additional affinity groups needed?*
- *How does the organization determine which decisions are made / governed by the Change Team, the executive director, existing policy, and/or the board?*
- *What additional support does the Change Team need to be successful?*
- *What is the board's level of involvement on the strategy work teams? Who will make decisions about the board's role?*

2. Internal Relationship-building + Communication

Strengthen organizational relationships centered around transparent communication, trust, accountability, and information accessibility.

Key Observations + Considerations
<ul style="list-style-type: none">● Rooted’s recent merger has highlighted differences between the individual cultures of CGW and CRC.● Staff turnover and differing program cultures and workloads restrict internal relationship-building opportunities.● Rooted has many moving parts / programs supported by many different funding sources.
Recommendations
<ol style="list-style-type: none">1. 2a. Accountability + Conflict Resolution (Segment 1): Develop team and organizational agreements outlining how Rooted staff will commit to being and engaging with one another around equity and inclusion. Review and refine on a regular basis.2. Collectively develop agreements around organizational transparency and communication.3. Engage in an examination of underlying cultures within each of the pre- and post-merge organizational units, identify overlap and differences, and determine opportunities for more unity and cohesion across programs.4. Establish an organizational Wiki / online information center that staff can use to access organizational history, external partnership information (including Rooted staff associations), and other important organizational knowledge (e.g. history, partnerships).
Reflection Questions
<ul style="list-style-type: none">● <i>How can we increase coordination and collaboration between programs?</i>● <i>How can we create more organizational synergy and cohesion despite our differing schedules and program areas?</i>● <i>How does Rooted’s history (and current state) as a primarily white and white-led organization impact its racial equity work?</i>

3. Learning Culture + Ongoing Engagement (Segment 1)

Develop a learning culture centered around vulnerability, reflection, compassion, and accountability, which is reinforced by meaningful peer-to-peer engagement and ongoing, agency-endorsed learning opportunities, both at an individual and organizational level.

Key Observations + Considerations
<ul style="list-style-type: none">● Providing staff and board with diverse and consistent opportunities to engage in learning around equity, inclusion, and racial justice will be key to ensuring staff are equipped to successfully navigate the journey ahead. This learning begins at an individual level.● Centering a historical understanding of racial inequity and oppression, as well as reflection-based exercises, will be important when engaging in these learning efforts.● Learning Culture + Ongoing Engagement (Segment 1) will focus on individual reflections and explorations.● Staff capacity / scheduling will play a significant role in the success of this focus area.
Recommendations
<ol style="list-style-type: none">1. Dedicate a set number of hours each week for staff to engage in equity-centered grounding and learning activities.2. Develop an individual learning / reflection series to kick off education around racial equity and provide time for group debrief (e.g. during program area team meetings) to reflect and specifically discuss ways in which this newfound knowledge can be integrated into programming and staff’s day-to-day work.
Reflection Questions
<ul style="list-style-type: none">● <i>How are we equipping staff with the knowledge they need to engage in racial equity work?</i>● <i>Are there opportunities to integrate racial equity learning into communication avenues we already circulate to staff?</i>● <i>How will we ensure staff are consistently engaging in and thinking about racial equity and justice as it relates to Rooted programming and staff’s individual contributions?</i>

4. Short-term Budget + Funding

Build budget and funding structures that do not perpetuate the nonprofit industrial complex, which ultimately limits the organization's capacity to center and fully lean into racial equity and justice.

Key Observations + Considerations
<ul style="list-style-type: none">● Traditional funding streams perpetuate the nonprofit industrial complex and limit opportunities for Rooted staff to intentionally and meaningfully engage in organizational racial equity work.● There are significant disparities in how USDA grants are awarded.● Almost half of Rooted staff are considered part-time.● Unrestricted funding is approximately 10% of Rooted's total revenue, which directly ties deliverables to grant and contract parameters.
Recommendations
<p>Examine opportunities to advocate for change within current budget and funding structures aimed at:</p> <ol style="list-style-type: none">1. Supporting more flexibility within staff positions;2. Supporting more manageable workloads;3. Supporting higher wages using an equitable and transparent process; and4. Providing more opportunities for staff to contribute to Rooted's racial equity work.
Reflection Questions
<ul style="list-style-type: none">● <i>Are there opportunities to leverage the Rooted Branding/Marketing Team in these efforts?</i>● <i>What capacity do current Rooted staff have to lead and manage these efforts?</i>

Phase 2: Deepening Our Work

The purpose of Phase 2 is to build on the infrastructure developed in Phase 1. While EQT has developed a series of Phase 2 recommendations, Rooted’s Phase 2 work will depend on its final Phase 1 outcomes. Phase 2 is also divided into five core strategy focus areas, which are displayed in Table 6 below.

Table 6. Phase 2 Strategy Focus Areas

<ul style="list-style-type: none">1. Strategy Work Team Development (<i>Detailed in Appendix D</i>)<ul style="list-style-type: none">a. Accountability + Conflict Resolution (Segment 2)*b. Learning Culture + Ongoing Engagement (Segment 2)*2. Long-term Budget + Funding3. External Language + Communications

**Represents strategies that serve as a continuation of work outlined within a Phase 1 Segment 1 focus area.*

1. Strategy Work Team Development

Continue to build the infrastructure and deepen the work of strategy work teams centered around five key focus areas (see Table 7 below). A more detailed analysis of each focus area can be found in [Appendix D](#).

Table 7. Strategy Work Team Focus Area Highlights*

<ul style="list-style-type: none">A. Programmatic WorkB. Human Resources + Organizational StructuresC. 1a. Accountability + Conflict Resolution (Segment 2)D. 1b. Learning Culture + Ongoing Engagement (Segment 2)E. External Relationship-building, Community, and Collective Power

**Details for each strategy focus area represented in Table 7 can be found in [Appendix D](#).*

2. Long-term Budget + Funding

Develop a long-term financial strategy to decrease reliance on traditional funding streams. This focus area provides an opportunity to revisit budget and funding concepts from Phase 1 through a longer-term strategy lens.

Key Observations + Considerations
<ul style="list-style-type: none">● Key observations and considerations identified in Phase 1 Short-Term Budget + Funding section.● While budget and funding shifts made during Phase 1 may provide short-term opportunities for staff to deepen their engagement with Rooted’s equity and inclusion work, more significant shifts related to funding sources, staff budget allocations, etc. will be required to ensure long-term sustainability.
Recommendations
<ol style="list-style-type: none">1. Launch a long-term fundraising strategy / campaign aimed at supporting more flexibility within staff positions, more manageable workloads, higher wages using an equitable and transparent process and more opportunities for staff to contribute to Rooted's racial equity work.2. Consider hiring a development director / team to support Rooted’s long-term budget and funding strategies.
Reflection Questions
<ul style="list-style-type: none">● <i>If we need external support, what pivots and/or next steps would this require? What funding changes or additions would be needed?</i>● <i>If we would like to hire for an internal development position, what pivots and/or next steps would this require? What funding changes or additions would be needed?</i>

3. External Language + Communications

Develop a plan that supports leadership, staff, and board in confidently and effectively communicating with external stakeholders about Rooted’s internal racial equity work.

Key Observations + Considerations
<ul style="list-style-type: none"> ● Rooted has strong racial equity and justice language within its organizational values, which is not as strongly reflected in their mission and vision. Rooted’s organizational values are not currently accessible to the public. ● Rooted leadership, staff, and board need consistent language to talk about their racial equity work. ● It will be important for Rooted to spend time exploring its internal racial equity and justice work before developing a proactive, formal external communications strategy.
Recommendations
<ol style="list-style-type: none"> 1. Explore opportunities to ensure Rooted’s organizational values are more publicly visible (short term). 2. Examine opportunities for Rooted’s mission and vision to more explicitly reflect racial equity and justice (long term). 3. Develop language (e.g. general talking points, commonly asked questions) for leadership, staff, and board members to respond to inquiries about the organization’s racial equity work, and adjust this language as the work evolves.
Reflection Questions
<ul style="list-style-type: none"> ● <i>What is food justice, and how does equity and inclusion relate to food? Are staff equipped with the language to speak about these connections?</i> ● <i>How will we respond when there is pushback from external partners, community members, funders, etc. about our explicit commitment to advancing racial equity?</i> ● <i>How will our executive director and other leadership team members be supported in these external communications?</i> ● <i>What additional support and/or information will the board need to effectively communicate and respond to inquiries about our efforts?</i>

Appendix



Appendix A: Environmental Scanning Assessment

Organizational Truths
<ul style="list-style-type: none">• While Rooted is a Madison-based organization, it also has an expansive statewide reach through its deeply community-based programming.• Rooted has many moving parts and programs supported by several funding sources, which can create complications related to staff workloads and flexibility and ultimately feed into the nonprofit industrial complex.• Rooted is a primarily white organization, which is juxtaposed with the fact that it primarily works with non-white youth and land resources are within diverse neighborhoods.• Rooted exists within the context of systemic racism, which manifests in the ways in which USDA grants are awarded and at times, impacts the ability of community members to participate in Rooted programming.• COVID-19 has inevitably impacted Rooted’s day-to-day work, which in turn impacts staff’s capacity to navigate their individual and collective workloads.
Accomplishments
<ul style="list-style-type: none">• The 2019 merge of CGW and CRC provided an opportunity for both organizations to deepen their existing collaboration, expand their strategic alliance, and increase their community impact.• Rooted formed the YWCA Equitable Organizations Change Team, as well as engaged in a comprehensive rebranding and website redevelopment process to further solidify their newly formed identity as one, cohesive entity and their commitment to equity and inclusion work.• Rooted has received organization- and board-wide support for their equity and inclusion work, which has included more intentional programmatic integration of equity and inclusion frameworks and practices• Rooted has expanded its program capacity and has successfully maintained its operations and financial stability during the COVID-19 pandemic.
Strengths
<ul style="list-style-type: none">• Rooted’s recent CGW and CRC merge has allowed the opportunity for both organizations to deepen their existing collaboration, expand their strategic alliance, and increase their community impact.• Rooted staff agree that the organization has an overall positive work environment with friendly, interesting, and passionate team members.

- Staff care about and are proud of the work they do and generally feel a significant amount of autonomy to carry out their day-to-day tasks.
- Rooted programming is creative, innovative, and a direct reflection of the expansive knowledge and expertise of staff, as well as staff’s expansive community networks across the state.

Opportunity Areas

Communication + Collaboration

- Because programs continue to function in silos, there are inefficiencies in how the organization allocates time and resources. What can Rooted do to practice more consistent, transparent communication and increase collaboration across the organization?
- How can Rooted promote and support increased coordination and cohesion between programming areas?

Staff + Programs

- At times, the high level of autonomy afforded to staff can be disorienting and contribute to confusion across programs. What can Rooted do to mitigate this impact?
- Because Rooted’s work is so deeply connected to the community, the organization needs to continue its work to deepen community relationship-building opportunities across programs. How can Rooted expand this community-building capacity to more staff?
- Disparities in how different programs are funded lead to inequities in professional development opportunities. How can Rooted promote and support more equitable opportunities for professional growth and development?
- While there is a strong emphasis on work-life balance, this benefit is not consistent throughout the organization and navigating unevenly distributed workloads can be challenging for staff. How can Rooted provide and promote a more equitable work-life balance across programs?

Human Resources

- Rooted’s relatively low pay rate continues to be a concern for staff and is seen as a barrier to more diverse hiring practices. What needs to happen to change this?
- There continues to be concerns surrounding Rooted’s structure and hierarchy. What can Rooted do to mitigate any adverse impacts of this structure?
- How can Rooted better account for diverse working styles and ensure systems, practices, and protocols embrace diversity and balance?

Appendix B: Visioning Assessment

1. Community-driven internal change management efforts

- a. It's about what the community wants, not what we think the community should want
- b. Representative staff, board of directors and program participants
- c. Community interest shapes workshops, employment and educational programming
- d. Collect community input including from youth
- e. Intentional about how we create access to resources, making sure that space is made, very intentionally, for people of color
- f. Collaborate and invite the community to drive that collaboration
- g. We are nuanced, interesting and based in many cultures, shaped by the young people and people of color who have found a home here
- h. Share equity and inclusion work with the community to help them understand the intentions behind and impact of our equity-centered change management strategy

2. Open, inclusive, supportive organizational culture centered around accountability

- a. Flattened hierarchical structure so that all voices and perspectives are included
- b. Increased support for new hires
- c. Increased support for staff from marginalized groups
- d. Culture centered around being honest, trustworthy and straightforward
- e. Everyone is treated with honor, respect and dignity
- f. The organization has internal accountability practices and intervention strategies to address behaviors that showcase cultural insensitivity, racial biases, and/or prejudice
- g. All staff receive strong, consistent professional development support to ensure they feel competent and confident in their work
- h. Staff have clarity around their individual roles - including how they are connected to the larger organization - and are empowered to pursue the organization's shared vision

3. Enhanced, inclusive recruiting, hiring, and retention processes, protocols, and practices

- a. Develop a hiring practice that works to recruit staff that represents the communities the programs serve
- b. Train and develop employees to help them move up within and outside the organization
- c. Raise wages
- d. Value knowledge over degrees
- e. The organization hires and retains staff members and volunteers who reflect the

<p>diversity, cultures, and languages of the populations in the community</p> <p>f. The organization hires and retains staff members and volunteers who demonstrate cultural humility</p>
<p>4. Improved collaborations with equity-centered funders and community partners</p>
<p>a. Develop authentic partnerships with funders and other organizations openly focused on equity</p> <p>b. Find ways to support partners that are already uplifting community</p>
<p>5. Decreased reliance on traditional funding streams</p>
<p>a. More aggressive, creative and robust fundraising to reduce reliance on grants (restrictive)</p> <p>b. Demonstrate utility to community in ways that are authentic and inspiring to fund</p>
<p>6. Equitable and culturally-responsive staff training and supports</p>
<p>a. Internal support systems for staff from marginalized groups (e.g. monthly staff of color support group)</p> <p>b. Employee resource groups to support organizational cultural growth</p> <p>c. Training on equity, cultural humility, anti-oppression, and how these concepts connect to and can be embedded in staff's day-to-day work</p> <p>d. Supervision strategies and support focused on strengths-based reflective techniques</p> <p>e. Organizational staff receive training and supervision on equity, inclusion, and principles of cultural humility</p> <p>f. Organizational staff receive training on how their own culture, status, or background can create risk for inadvertent use of power and control</p> <p>g. All staff receive strong, consistent professional development support to ensure they feel competent and confident in their work</p>
<p>7. Consistent, responsive feedback mechanisms</p>
<p>a. The organization has feedback mechanisms that evaluate whether or not staff feel safe and valued at the organization and are incorporated into ongoing organizational change</p>

Appendix C: Barrier Examination Assessment

COVID-19	
Funding Streams	Organizational Culture + Values
<ul style="list-style-type: none"> ● We have a very strong USDA/government grant writing history that keeps us in a narrow lane for fundraising ● Current grant systems do not leave time for relationship building for stronger connections ● As land workers, we are always pressed for time and funds leaving limited space for things that get set aside (i.e. relationship building, diversified budget and funding) ● Inflexible systems that maintain the status quo ● Hesitancy to engage with nontraditional collaborators 	<ul style="list-style-type: none"> ● Conservation, sustainability and gardening in general are seen as a focus and concern of the middle class and privileged (white people) ● Creating an inclusive culture as a predominantly white org is inherently problematic ● Work culture and practices are white-centered ● Do not center other ways of knowing, doing, and being: internal and external collaboration when it does not align with traditional structures
Community Engagement + Relationship-building	Hiring, Onboarding + Training
<ul style="list-style-type: none"> ● Divergent audiences including community members whose voices we should lift and (financial) supporters ● Different levels of confidence on connecting with communities about Rooted and its programs ● Inconsistent community engagement and relationship building across programs (including building trust) ● Absence of resources to make connections in the community ● Inadequate community-driven process -- shared leadership, sharing power ● Broad idea of boundaries of the 	<ul style="list-style-type: none"> ● We write for ourselves and attract ourselves ● Inconsistencies related to the hiring/onboarding process - narrow/restrictive ● Educator hiring pool is mainly white ● Confusing onboarding process and absence of ongoing training ● Low salaries are problematic and create barriers for staff

<p>population we're trying to serve: State, county, city, northside</p> <ul style="list-style-type: none"> ● Absence of common organizational understanding of community ● Disjointed/fragmented efforts to community organizations ● Time for relationship building in community not prioritized across programs ● Staff connections with and knowledge of POC led orgs in Madison inconsistent across programs 	
<p>Merger Communications</p>	<p>Staff + Programs</p>
<ul style="list-style-type: none"> ● CGW Historical mission, which is steeped in Madison culture, may not align with the current mission. (leads to chaos about what the mission actually is) ● Uncoordinated efforts/inconsistent access to organizational knowledge ● Inconsistent communication processes ● Inaccessibility to previous contacts & coordinators of POC led organizations that have partnered with us in the past: continuous phone ringing, emails left hanging 	<ul style="list-style-type: none"> ● Time for relationship building in community not prioritized across programs ● Disjointed efforts to collaborate internally/make connections with each other across programs ● Unbalanced work conditions ● Unequal interactions among staff ● Shrinking staff and disjointed systems with rapid staff turnover ● As land workers, we are always pressed for time and funds leaving limited space for - things that get set aside: relationship building, diversified budget and funding) ● The chaos of merger, turnover, grant-based programs make it difficult to build consistent culture. (ext. and int. factors)

Appendix D: Strategy Work Team Focus Areas

Focus Area A: Programmatic Work	
Description	Continue to develop and sustain BIPOC community-driven programs that reflect racial equity and justice within funding, structure, goals, implementation, and outcomes.
Key Observations + Considerations	<ul style="list-style-type: none"> • There is some confusion about the various organizational roles / programming and how they intersect with one another. • COVID-19 is disproportionately impacting the communities Rooted serves. • Staff would like to share more about Rooted’s story and the impact of their work with the community.
Recommendations	<ol style="list-style-type: none"> 1. Develop more specific program and project descriptions for increased, agency-wide clarity. 2. Design and implement a racial equity and justice screening tool used to assess strengths and opportunity areas for all programming. 3. Consider where additional opportunities exist to share more about Rooted’s work with the community.
Reflection Questions	<ul style="list-style-type: none"> • <i>Where are there opportunities to strengthen our connections with BIPOC communities? How are staff across all programs and levels engaged in these efforts?</i> • <i>How can we shift our service provision models to improve our responses to BIPOC communities?</i> • <i>Are the resources (land, space, equipment) Rooted controls and/or has access to being used and/or shared equitably with the community?</i> • <i>How can we better align our work with the practices and approaches within the Equitable Food-Oriented Development white paper and the work of Soul Fire Farm?</i> • <i>Are we willing to eliminate or advocate for change within</i>

	<i>programming that does not align with our racial equity and justice values?</i>
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Focus Area B: Human Resources + Organizational Structures	
Description	Continue to develop and advocate for organizational systems, structures, policies, and practices that center racial equity and justice.
Key Observations + Considerations	<ul style="list-style-type: none"> ● Inequities exist between programs as it relates to staff workloads, capacity and flexibility. ● Many staff described a need for bolstered onboarding and professional development opportunities. ● Rooted’s relatively low pay rate continues to be a concern for staff and is seen as a barrier to more diverse hiring practices. ● Rooted writes for themselves, which leads to hiring candidates who are similarly aligned. This is problematic because most of the staff (and most of those writing for and hiring positions) are white. ● A push and pull exists between funders / financial supporters and the voices and perspectives of the communities Rooted serves.
Recommendations	<ol style="list-style-type: none"> 1. Develop an assessment and improvement plan for programs with staff who are consistently working longer hours compared to other organizational units. 2. Enhance interview questions to assess for cultural humility and commitment to racial equity. 3. Establish a structured 6-12 month onboarding process for new hires, including a cross-departmental mentor through their first year. Ensure racial equity work and practices are centered throughout the onboarding process. 4. Consider implementing non-monetary compensation package offerings to offset low wages (e.g. professional development budget, amount of PTO, financial wellness program, especially

	<p>in light of COVID-19).</p> <ol style="list-style-type: none"> 5. Review Rooted employee handbook through an equity lens. 6. Examine board by-laws, practices, and protocols to ensure they are fulfilling their role in furthering racial equity and justice. 7. Establish quarterly, anonymous feedback mechanisms that evaluate whether or not staff feel safe, valued, and supported. 8. Consider flattening current hierarchical structure and ensure BIPOC staff are in leadership / decision-making positions and/or develop protocols and processes that increase opportunities for collective decision-making centered around BIPOC and other marginalized organizational voices (e.g. farm staff).
Reflection Questions	<ul style="list-style-type: none"> ● <i>What human resources protocols, procedures, and practices support or actively push against white supremacy culture?</i> ● <i>Compared to other Rooted staff, farm team members and other staff will experience a significant number of barriers around participating in the organization's racial equity work. How will we account for this?</i> ● <i>Should we have a separate feedback tool for BIPOC staff and staff from other marginalized groups?</i> ● <i>BIPOC staff are all within the Badger Rock team, which represents a small percentage of Rooted's staff base. How are we accounting for this in our decision-making protocols?</i>

Focus Area C: 1a. Accountability + Conflict Resolution (Segment 2)	
Description	Ensure leadership, staff, and Board members are equipped with tools to hold one another accountable to the organization's racial equity work, as well as successfully navigate conflict. This segment builds on the team and organizational agreements developed in Segment 1 of this focus area.
Key Observations + Considerations	<ul style="list-style-type: none"> ● Rooted is a hierarchical organization, which can play a role in whether or not staff feel safe providing feedback to their

	<p>colleagues, including their superiors.</p> <ul style="list-style-type: none"> ● Establishing strong accountability measures that all staff and board members understand and formally agree to is a key component of organizational racial equity work.
Recommendations	<ol style="list-style-type: none"> 1. Adopt a transformative justice / community accountability protocol to organizational disputes and harm, which addresses the harm receiver's immediate needs and actively works to change the root causes of that harmful act on both an individual and organizational / systems level. 2. Establish protocols and training supports for staff to intervene when other staff, clients, community members, or partners are observed engaging in behaviors that show cultural insensitivity, racial biases, and prejudice.
Reflection Questions	<ul style="list-style-type: none"> ● <i>Do implemented protocols and support consider how power structures impact accountability and conflict resolution?</i> ● <i>What happens when a staff member is not leaning into or living by the organization's commitment to and values around racial equity and justice?</i>

Focus Area D: 1b. Learning Culture + Ongoing Engagement (Segment 2)	
Description	Develop an internal <i>Learning Edge</i> program / group professional development series centered around racial equity and justice. This segment builds on the individually-focused learning opportunities developed in Segment 1 of this focus area by providing staff with more group learning and reflection opportunities.
Key Observations + Considerations	<ul style="list-style-type: none"> ● Providing staff and board with diverse and consistent opportunities to engage in learning around equity, inclusion, and racial justice will be key to ensuring staff are equipped to successfully navigate the journey ahead. Once staff have begun engaging in this learning on an individual level, Rooted should provide more group learning and reflection opportunities to work alongside individual staff learning.

	<ul style="list-style-type: none"> ● Staff capacity / scheduling will play a significant role in the success of this focus area.
Recommendations	<ol style="list-style-type: none"> 1. Develop an internal <i>Learning Edge</i> program / professional development series centered around racial equity and justice, ranging from informal staff conversations to externally-facilitated workshops. This professional development series would be led and monitored by the Change Team. 2. Dedicate a set number of hours each week for staff to engage in equity-centered professional development activities. This will be especially important for this segment as a key component of these group learning opportunities is the opportunity for staff to actively engage with, challenge, and learn from one another in a group setting.
Reflection Questions	<ul style="list-style-type: none"> ● <i>What internal, external, and group dynamics need to be considered when engaging in collective learning around racial equity and justice?</i> ● <i>How do / can our established affinity groups play a role here?</i>

Focus Area E: External Relationship-building, Community, and Collective Power	
Description	Examine ways to strengthen relationships with BIPOC-led and equity-centered organizations and explore ways to center community voicing in programmatic work and organizational decisions through community feedback and engagement opportunities.
Key Observations + Considerations	<ul style="list-style-type: none"> ● Staff have disjointed connections with and understanding of “community,” which restricts consistent external engagement and relationship-building efforts across programs. ● Staff connections with and knowledge of BIPOC-led organizations is inconsistent across programs. ● There are differing levels of confidence across staff members around connecting with communities about Rooted and its programming.

<p>Recommendations</p>	<ol style="list-style-type: none"> 1. Conduct an environmental scan of existing collaborations and partnerships. 2. Establish a Rooted <i>Community Voicing</i> program that recruits and compensates diverse community members (including youth) to directly inform and be an integral part of Rooted programming and organizational decisions (e.g. leveraging current Community Advisory Board and modeling non-perpetuation of NPIC). 3. Explore ways for staff at all organizational levels to be a stronger part of communicating and being in community with those Rooted serves. 4. Develop stronger collaborations with BIPOC-led and equity-centered community organizations / partners. 5. Develop a quarterly, more expansive community feedback gathering system (e.g. survey, focus groups) to work alongside the Rooted <i>Community Voicing</i> program. Consider how staff can play an active role in these efforts.
<p>Reflection Questions</p>	<ul style="list-style-type: none"> ● <i>Where are there opportunities to strengthen our connections with BIPOC communities? How are staff across all programs and levels engaged in these efforts?</i> ● <i>How are we circling back to community members to share how their input has impacted our work?</i> ● <i>Which of our partnerships / collaborations are with and/or centered around BIPOC communities? Which of our partnerships / collaborations are led or controlled by white leadership? What patterns or intersections emerge from this examination?</i>

Appendix E: Project Planning Template

Strategy Focus Area					
Implementation Steps	Tasks	Lead (Support)	Timeline	Status	Notes
				NOT STARTED	
				IN PROGRESS	
				COMPLETED	
				NOT STARTED	
				IN PROGRESS	
				COMPLETED	
				NOT STARTED	
				IN PROGRESS	
				COMPLETED	
				NOT STARTED	
				IN PROGRESS	
				COMPLETED	
				NOT STARTED	
				IN PROGRESS	
				COMPLETED	
				NOT STARTED	
				IN PROGRESS	
				COMPLETED	