



Innovation in Action

Three Case Studies from the Intersections of Arts
& Social Justice in EmcArts' *Innovation Labs*:

Featuring: Alternate ROOTS, Hull-House Museum and The Theater Offensive

PREPARED BY:



Project Summary

Alternate ROOTS is a 39-year old regional arts organization in the South. As a national resource for artists and cultural organizers, ROOTS champions social and economic justice and provides connective tissue for artists whose cultural work strives for social justice. Over the course of four decades, ROOTS had been incrementally fine-tuning its membership and governance policies, but rapid growth in reach and reputation in the last five years had caused significant “growing pains.” A team from ROOTS entered EmcArts’ *Innovation Lab for Arts Development Agencies* in 2013 to grapple with the strengths and limits of their current membership structure. They asked: *What is the membership structure that best reflects central values of ROOTS – connectedness, participatory democracy and anti-oppression – while also positioning ROOTS as the organization of choice for community engaged artists in the 21st century?*



Introduction & Context

Alternate ROOTS is a regional arts organization based in the Southern USA whose mission is to support the creation and presentation of original art, which is rooted in a particular community of place, tradition, or spirit. As a member-driven resource for artists and a multidisciplinary coalition of cultural organizers, ROOTS strives for the elimination of all forms of oppression, and champions economic and social justice. ROOTS connects and supports artists working for social justice in the South through various programs — by providing grants for artistic assistance and fee subsidies for bringing ROOTS artists into new communities, by hosting regional events and gatherings, and by partnering with groups working on progressive issues. Unlike many other network or service organizations, ROOTS members—who are cultural workers, artists and activists—develop ROOTS programs themselves, while ROOTS provides resources to encourage their stability, capacity, and skills instead of simply focusing on artistic support or service delivery. Since its founding in 1976, ROOTS has steadily emerged in the field of community-based arts as an innovative, responsive thought leader that supports regional cultural organizing and social justice action.

ROOTS was originally founded at the [Highlander Center](#) in Tennessee, a training and leadership center for grassroots organizing and regional movement building in Appalachia and the South. The Center's anti-racist legacy and its ties to the Civil Rights movement inspire ROOTS's work, and like the Highlander Center, ROOTS occupies critical intellectual, cultural, and activist space in the South. ROOTS is guided by core principles of Equitable Partnership, Shared Power, Open Dialogue, Aesthetics, and Individual and Community Transformation. Since ROOTS is mission-driven to dismantle all forms of oppression, it also functions as a catalyst for art and action, and an incubator for participatory democracy. These central tenets also lead ROOTS to prioritize deep engagement of members in all aspects of the organization. So when ROOTS undertook an ambitious initiative to increase alignment between its membership and governance structures and its core principles—the



Watch a short animated video explaining the organizational assumptions at the core of Alternate ROOTS's complex challenge

heart of the organization itself — through the *Innovation Lab*, its member-focused identity and values were at stake.

Over the course of four decades, ROOTS had been incrementally fine-tuning its membership and governance policies, but rapid growth in reach and reputation in the last five years had caused significant “growing pains.” In the early 2000s, ROOTS membership had been about 100 people, but at the time of their participation in the *Innovation Lab* in 2013, they had 375 members. Preliminary survey data indicated that close to 1,000 artists in the South were interested in joining their network, or were already an informal part of their network. ROOTS was also growing in other ways besides membership. As a regional organization with a national footprint, ROOTS had recently committed to having a greater impact upon the artists in the South, as well as the larger field of community-engaged art. For most of its existence, ROOTS operated on a budget of approximately \$350,000, but by 2013, its operating budget had doubled to more than \$700,000. ROOTS’s current annual budget is now more than \$1million, and for the last few years, they had steadily been increasing staffing capacity. ROOTS was now realizing that in order to support increased demand, expanding programs, and needs of new and future members, they needed to restructure their policies.

ROOTS’s original membership policy had three separate categories that did not easily feed into a staggered, strategic engagement pipeline; they also required a high degree of commitment from a subsection of members. Until now one could be a Voting member, which required artists to live in the ROOTS service region¹ and be a Board member, or be a Satellite member, which was a non-voting category open to artists living outside of ROOTS’s service region. There was also an Introductory membership category that was that, for a fee of \$20, got a one-time discounted registration at the member rate to the annual summertime meeting, called ROOTS Week. Of these three categories, only Voting members could access ROOTS’s grants and services such as re-granting programs, which provided incredible financial resources, artistic assistance, and partnership supports.



— Sketches by Ariston Jacks, ROOTS Innovation Team Member

¹ The ROOTS Service Region covers the Southern area of the United States: Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, South Carolina, Tennessee, Texas, Virginia, West Virginia, and Washington, D.C.

The Voting member category was problematic however, since ROOTS policy mandated that all Voting members be automatically inducted into the Board of Directors. This meant that the ROOTS Board routinely averaged more than 100 members at a time. Voting members also had to be elected by existing members—a process that happened only once a year at the annual ROOTS Week. Given the large size of the Board of Directors, governance functions were managed by a 15-member Executive Committee, which is elected to act on behalf of the Board.

“This old system forced people after a year [into] either becoming Voting members or having no official relationship to ROOTS,” said Carlton Turner, ROOTS’s Executive Director. This policy assumed that people who wanted to be involved with ROOTS could automatically accept fiduciary and legal responsibilities as Board members. The model also inadvertently set up a barrier to access by requiring artists to attend ROOTS Week in person in order to get voted in. “Even though it’s comparatively cheap registration, not everyone can afford to take time off work and travel to ROOTS Week once a year,” said Ashley Minner, Baltimore-based visual artist, member of the Lumbee Tribe of North Carolina, and the Chair of ROOTS Visual Arts Ensemble, which is one of the many member-led committees and working groups that execute ROOTS programmatic work. ROOTS staff also had recent data indicating that a large number of people had requested subsidies to attend ROOTS Week between 2010 and 2012, and that 80% of these applicants earned less than \$15,000 per year. Research also showed that the majority of new members in the last decade were mid-career artists and organizers of color and under 45 years of age. It was clear that those membership policies were an economic hardship for a large section of their constituency. Moreover, ROOTS’s commitment to serving low-income communities of color in the South meant that their board was not a fundraising board, since members—who were already struggling to sustain their art—could not financially contribute to ROOTS. This model was also needlessly confusing. “We had a hard time explaining it to each other, let alone new folks,” said Kathie deNobriga, Founding Member and former Executive Director of ROOTS.

There were, of course, legitimate reasons why the three-tiered membership structure had originally been set up. Firstly, ROOTS had strong historical and political imperatives for prioritizing cultural workers and artists

in the South as Voting members. ROOTS’s Southern service areas are connected to its own history of place-based organizing and community resiliency building. The South is also underserved in terms of resources in both art and social justice. Important cultural and community organizing work in the South regularly goes unfunded and ignored by the rest of the country, so it is strategic for ROOTS to continue emphasizing the highest levels of representation and responsibility in its Southern Voting members. Secondly, ROOTS’s founding membership valued the rights of members to be fully empowered in ROOTS governance and decision-making. The idea was that each member could decisively use their voices and their power to affect decision-making only if they were a Board member. And lastly, the policy that mandated in-person attendance at the annual ROOTS Week retreat to access Voting membership was instituted to preserve the rich, cultural tradition of relational organizing in the South. “It was always important to ROOTS that people made personal, face-to-face connections at ROOTS Week,” deNobriga said. It was understood that in-person relationship building at ROOTS Week facilitated solidarity and trust, which is foundational to a collective that is organizing against oppression together. Yet even with these concrete reasons, ROOTS was struggling to balance the contradictions and ameliorate the barriers set up by the original member policies.

The Membership Innovation Ensemble, a working group of staff and ROOTS members, had been grappling with these contradictions and questions around the strengths and limits of their membership structure for some time. Some core questions they were tackling included: *What is the membership structure that best reflects central values of ROOTS — connectedness, participatory democracy and anti-oppression — while also positioning ROOTS as the organization of choice for community engaged artists in the 21st century? How can we provide more access to ROOTS while simultaneously offering artists’ choices about the level of engagement they wish to have? How do we responsibly expand our reach in a way that honors the contributions of its elders and the strengths of the existing member structures, and retains a sense of continuity and history while also reflecting the needs of new members?*

At this time, ROOTS had also emerged from a strategic planning process that surfaced resonant questions for them around other areas of organizational life and function. Their strategic plan included goals for

Core Questions ROOTS addressed in their *Innovation Lab*:

What is the membership structure that best reflects central values of ROOTS – connectedness, participatory democracy and anti-oppression – while also positioning ROOTS as the organization of choice for community engaged artists in the 21st century?

How can we provide more access to ROOTS while simultaneously offering artists' choices about the level of engagement they wish to have?

How do we responsibly expand our reach in a way that honors the contributions of its elders and the strengths of the existing member structures, and retains a sense of continuity and history while also reflecting the needs of new members?

expanding their staff capacity, sharpening the action components of their mission, and strengthening overall stability by bringing organizational structures in closer alignment with their values of inclusivity and anti-oppression. Impending changes from implementing the strategic plan presented tremendous synergistic possibilities for overlap with the *Innovation Lab* process for redesigning membership structures. ROOTS found itself at a critical adaptive change-making juncture; conditions for change-making were clear and urgent, and the timing was strategically opportune. Driven by all these factors as well as the realization that it was now time for a significant organizational overhaul, instead of simply small tweaks and adjustments, Alternate ROOTS was accepted into the Lab in Fall 2013.

PROCESS

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Most of the different configurations happened in Phase 1 as we tried to unpack what adaptive change was. We wanted to bring in long-time members, founding members, new members, artists and community organizers, staff and leadership of Executive Committee, as well as folks who have been around only a few years but contribute to leadership.

— Carlton Turner, Executive Director, Alternate ROOTS

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About the Lab

Alternate ROOTS was accepted into Round 1 of EmcArts' *Innovation Lab* for Arts Development Agencies and started the program in January 2013. The *Innovation Lab* is a three-phase program that provides a strong framework in which new strategies can be explored and prototyped in relatively low-stakes environments before a full launch. The first phase focuses on researching and assessing the adaptive challenge at hand, and developing a cross-constituent team to plan strategies for intervention. The second phase accelerates the project by building organizational momentum through decision-making at a five-day intensive retreat. The third phase involves prototyping, evaluating and refining the adaptive interventions. [Read more about the *Innovation Lab* for Arts Development Agencies.](#)

According to Keryl McCord, Managing Director of ROOTS, the Lab couldn't have happened at a better time. "The shape and structure of the strategic plan was modeled on ROOTS's mission statement," she said. "And the Lab allowed us to dig deeper into strategic plan implementation." This meant that efforts to redesign membership structures through the Lab were also legitimized by strategic plan objectives and advanced by ROOTS's mission and values. The Lab overlapped with their strategic plan implementation for a full year, which allowed ROOTS to operationalize aspects of their strategic plan into new membership proposals. Turner said that the Lab was also the best format for ROOTS to dream and experiment collaboratively and concretely. "We had the luxury of having a dedicated facilitator to work with us on a specific problem for a long time so we could lean on him to draw threads together from different conversations and keep us on track," he said. "The Lab gave us permission to think outside the box," added DeNobriga. "It was a catalyst for us to challenge some long-time, deeply-held beliefs about what membership should be."

ROOTS approached each of the Lab's four phases in a

smart and intentional way, always taking great care to ensure that the right mix of people were in the room. For each of these phases, ROOTS chose a wide and representative swath of members to participate in dialogues and decision-making. “We tried to cover all bases in terms of skillsets, experiences, history, institutional memory, and exposure to organizational culture,” said Minner. “Most of the different configurations happened in Phase 1 as we tried to unpack what adaptive change was,” Turner said. “We wanted to bring in long-time members, founding members, new members, artists and community organizers, staff and leadership of Executive Committee, as well as folks who have been around only a few years but contribute to leadership.” The desire to make sure that all voices are heard is infused into the fabric of ROOTS’ organizational culture. The team intuitively configured their Lab meetings as diverse spaces, which set them up to succeed from the beginning.

After Phase 1, ROOTS made a bold decision. With the seed grant money, they hired Carrie Brunk, a community organizer and friend of ROOTS, to lead their “Campaign for Change,” the internal name given to membership restructuring efforts. Brunk’s expertise as a community organizer was exactly what ROOTS needed in Phases 3 and 4, when meaningful dialogue and support for the new membership proposals had to be solicited. Ms. Brunk facilitated the campaign, supporting staff and leadership in engaging the ROOTS’ network and systemically collecting their feedback about the proposed policy changes. Guided by ROOTS’ imperatives on creating an inclusive network, the campaign returned continuously to its members - to inform them about what was going on, to solicit questions and concerns, and to check for tension or pushback. The team sent out regular updates and wrote about the Lab on [blog posts on their website](#). The proposed changes to membership policies were moved through the body of ROOTS in this order: First, they were presented before the Executive Committee, which approved them after deliberation. Then, the Executive Committee and Membership Innovation Ensemble jointly mounted a campaign to contact all 150 Voting members in ever widening circles by phone and email to inform them about the proposed changes. Feedback from all Voting members was corralled in a shared spreadsheet, and staff and Executive Committee members reported back regularly on what they were hearing from their constituents.

By the time members arrived at ROOTS Week that summer, they had heard about the ambitious membership restructuring project and were well-prepared to vote on the proposals. “Previously, people had concerns about voting on proposals in-person at ROOTS Week. They were worried about how tense the conversations might get, or if some dialogues would get dominated, or if their voices would be heard. I think that’s what the internal organizing strategy addressed. [Using the strategy] made sure that perspectives that didn’t align with what most members wanted wouldn’t overwhelm the dialogues at ROOTS Week. It also generated a lot of goodwill because people felt they were heard before the proposals went up for voting before membership,” said Brunk. The decision to run ROOTS’s change-making process utilizing Brunk’s experience as a community organizer was unique, given that most arts organizations in the U.S do not hire organizers to run campaigns for internal stakeholder engagement and decision-making. ROOTS’s goal was not to strong-arm people into changing their minds, but rather to craft a process that was aligned with ROOTS values of democratic participation and dialogue that supports people in making their own choices. “The idea was not to convince people about the membership changes, but rather to meaningfully engage everyone in active conversations about whether the changes were good or not. If they felt the proposals were good, they would vote to approve them at ROOTS Week,” Brunk added. That’s indeed what happened. The proposals to change the membership policies were passed by Voting members at the 2014 ROOTS Week in North Carolina. The changes are outlined in the table alongside.

This mindful, iterative process of enrolling members in change-making produced two substantial modifications to ROOTS’s membership policies. Firstly, their new model collapses the original member categories into two simple individual ones—General and Voting—and one new Organizational Membership category. General members can now be based anywhere in the US, and can access ROOTS’s programs and services, but they are not Board members. Voting members, on the other hand, are required to live in the ROOTS service area, and are considered Board members with fiscal and legal responsibility to ROOTS. Voting members must assume trusteeship for ROOTS and play a role in governing the organization, including performing functions such as voting in new members, electing the Executive Committee, and approving changes to by-laws, policies,

ROOTS Adaptive Changes through the *Innovation Lab*: A Summary

Areas of Adaptive Change	'Before' Innovation Lab	'After' Innovation Lab
<p>Membership Categories and Responsibilities</p>	<p>Voting members were based in the U.S South, and had access to ROOTS grants and services, but were also automatically inducted to ROOTS Board of Directors, with fiduciary and legal responsibilities.</p> <p>Introductory Members got a one-time discounted registration (\$20) to annual ROOTS Week Retreat. They could 'convert' to Voting membership through an in-person nomination by another Voting member at ROOTS week.</p> <p>Satellite members were non-Southern artists with no fiduciary, Board, or Voting responsibilities.</p>	<p>New membership structure:</p> <p>General members can be based anywhere in the US, and have the same benefits as Voting members but do not have formal governance responsibilities on the Board. General members are encouraged to participate in the work of the organization, and can access ROOTS services and funding opportunities. ROOTS' programs, services artistic assistance and grants however, continue to prioritize members living in their Southern service region, and additional requirements for eligibility apply in some cases. ROOTS' staff make exceptions to practice in order to serve the mission and strategic plan.</p> <p>Voting members are based in the U.S South, and inducted as Board members with fiduciary and legal responsibilities. They play a role in governing ROOTS, voting in new members, and electing the Executive Committee. Voting members can access ROOTS grants and services.</p> <p>Organizational members are non-profits, companies, ensembles, co-operatives, community centers, and other organizational structures all over the U.S that are in allyship with ROOTS, and are aligned with ROOTS mission and vision.</p>

Areas of Adaptive Change	'Before' Innovation Lab	'After' Innovation Lab
<p>Membership Benefits and Privileges</p>	<p>Voting members were Southern artists who automatically served on ROOTS' Board, and could access all of ROOTS grants and services, including fee discounts to ROOTS programs, eligibility for artistic assistance and partnerships.</p> <p>Introductory Members had no access to ROOTS grants and services and no voting privileges, until they converted to Voting membership at ROOTS Week.</p> <p>Satellite members were non-Southern artists with no access to ROOTS grants or partnerships, and no voting privileges.</p>	<p>General Members can access all the benefits of ROOTS programs, partnerships, re-granting services and discounts even if they do not live in the South. Under strategic direction from staff, ROOTS programs and assistance continue to prioritize Southern members. General members are not required to serve on the ROOTS Board, but are encouraged to participate in the work of the organization.</p> <p>Voting members are based in the South and can access all the benefits of ROOTS programs, partnerships, re-granting services and discounts. They are also inducted as Board members with fiduciary and legal responsibilities, and play an important role in the governance of ROOTS.</p> <p>Organizational Members may list their organizational news and activities in ROOTS publications and post their profile on the ROOTS website. They benefit from regular access and exposure to ROOTS regional network.</p>
<p>Membership Induction</p>	<p>Introductory members could sign up for discounted registration to ROOTS Week anytime through an online application.</p> <p>Satellite members were inducted in person at the annual ROOTS Week Retreat.</p> <p>Voting members were inducted through a system that was infrequent and less accessible. Members had to mandatorily travel to the annual ROOTS Week Retreat and be voted in by existing Voting members.</p>	<p>Applications for all three levels of General, Voting and Organizational membership are now available anytime, and accessible online and by phone.</p> <p>General and Organizational members can be inducted on a rolling basis. Applications are reviewed by staff, and there is no requirement to attend the annual ROOTS Week Retreat.</p> <p>Voting members can apply anytime, and applications are reviewed and approved quarterly by the Membership Work Group at the annual ROOTS Week Retreat, and two more times during the year on conference calls that are open to all Voting members. Attendance at annual ROOTS Week is not required to be voted in.</p>

and the mission statement. Voting members who leave the South automatically become General members. ROOTS programs and services are now accessible to both General and Voting members, although there is continued focus on re-granting in its Southern service region. The new category of Organizational membership is open to non-profits, companies, ensembles, co-operatives, community centers, and other organizational structures from all over the US that are in allyship with ROOTS and are aligned with ROOTS’s mission and vision. All three of these new member categories have the same annual membership dues of \$40 per year.

“At ROOTS Week, after this proposal passed, it seemed that members made speedy use of the changes in structure, with about half joining on as Voting Board members, and the other half joining as General members,” said Brunk. This development also suggested that ROOTS was on the correct track with these changes . . . that a large number of their members did indeed want the benefits of membership without the responsibilities of being on the Board. Brunk also explained that some members questions and concerns about the proposal changes centered on what exactly constituted democratic participation in ROOTS. “Some people thought that being a Board member is foundational to ROOTS because that’s how they can participate in how it’s governed,” she said. “Other folks argued that ROOTS can actually become more participatory by giving people a choice in how they want to be involved, either as a Board member or not. For example, there was a pretense prior to these changes that just because everyone is a Board member, that means they have access to the same information and knowledge, and are thus prepared to decide and vote on the budget and assume fiduciary responsibility for the organization. Many people believed ROOTS needed an option for people who didn’t want that level of responsibility.”

The second big change in membership policies was expanded frequency of induction opportunities for prospective members. Now, a simple online membership application is available year-round to all levels of members so that people interested in joining the ROOTS network do not have to wait until the annual ROOTS Week gathering to be voted in. Induction for General and Organizational membership is reviewed by staff on a rolling basis and does not require attendance at the annual ROOTS Week Retreat. Additionally, applications for Voting members are reviewed by a Membership



– Sketches by Ariston Jacks, ROOTS Innovation Team Member

Working Group quarterly, at the annual ROOTS Week, and two more times during the year through conference calls and virtual elections open to all Voting members. Voting members can also nominate themselves for the Board if they want. “This new system opens things up and makes ROOTS more accessible,” Minner said. “We’ve also moved our election of new members during ROOTS Week to the middle of the week, on a Wednesday. It used to happen on a Sunday when folks were already tired, packing up and ready to leave. Now we can nominate new members online and elect them more easily.”

These membership policy changes eliminate some structural barriers to access, and the new categories also allow individual members to proactively choose an optimal level of engagement and responsibility for themselves. Turner anticipated that this new membership structure would attract more members. “It’s easier to see a clear pathway on how to enter our network now and to understand the responsibility of membership,” he said. At the culmination of Phase 3 of the Lab, ROOTS had implemented a serious upgrade to their membership policies. Their new structure encourages empowered participation, is more closely aligned with their anti-oppression mandate, and reflects their expanding national footprint.

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— Nayantara Sen, ROOTS Profile Writer

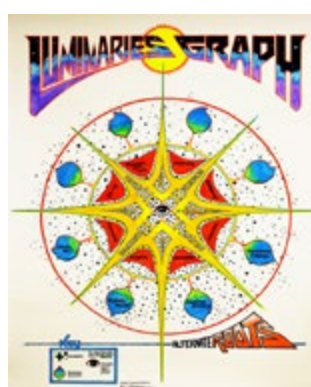
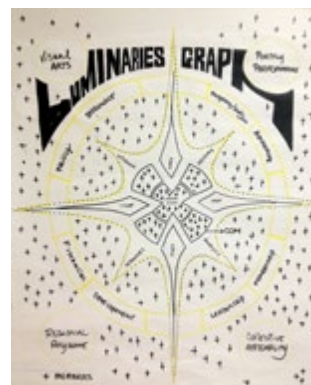
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DISCOVERIES

The team experienced a set of breakthroughs early on in their process that helped them move past difficult conversations about change-making and clarified strategic directions for their project. They discovered that there was a wide gap between policies written in their bylaws and deeply ingrained cultural traditions. Ashley Walden Davis, ROOTS Programs Director, explained that, “Many traditions and practices have been codified as ROOTS ‘law’ when in fact there are very few times and processes that our bylaws actually mandate.” Minner said that the team initially got mired in reviewing these policies before realizing that they didn’t have to change them. “We killed a couple of days in Atlanta going through the bylaws, which were sparse and left a lot to be desired,” said Minner. “We thought it was going to be intense, that we were going to have to call in the lawyers. But then we realized we didn’t have to change that much.” The parsing out of the distinction between organizational policies and cultural practices at this early juncture allowed the ROOTS team to refocus their attention on culture-shifting and member engagement, instead of pushing through a bureaucratic policy change process with their Executive Committee and Board.

In Phase 2, the team also participated in an unconventional process of using graphic illustration and visual metaphors to analyze their membership and governance structures. During the first meeting of this phase, Ariston Jacks, a visual artist and new member of ROOTS, was doodling in the margins of his notebook and breaking down difficult ideas into visual components. The ROOTS team noticed this, encouraged him to bring his artistry into each subsequent meeting, and provided him with the tools and space necessary to make visual art an intentional part of their overall process and its output. At the week-long intensive in Virginia, Jacks drew the [the ROOTS Lumaries Chart](#), a graphic representation of ROOTS’s mission and organizational structure.

Organizational change language is often industry-specific, jargon-heavy, and inaccessible to artists outside the mainstream non-profit fold (which is a large part of ROOTS’s base). In multiple meetings, Jacks was able to unpack and simplify these ideas into a



– Sketches by Ariston Jacks, ROOTS Innovation Team Member

more accessible, visual language. “I was asking simple questions about the jargon, and this made them go back and revise their approaches,” Jacks said. As he drew, the team began to see connections and gaps between organizational parts that were previously missed. Jacks visually represented their transition over the course of five days, which enabled the team to explain complex ideas to themselves. “I was drawing visual aids that prompted the group to solve problems at a higher level,” said Jacks. “We stumbled upon that. If I hadn’t been in the room, maybe we wouldn’t have discovered it.” This transformative experience was made possible by two things: the strategic value that ROOTS placed on ensuring a diversity of voices—especially the mix of old and new members—was in the room, and the centralizing of art in how they perform their daily work. “Art is our superpower,” said Minner. “We reminded ourselves of that a lot. We took art breaks.” With Jacks’s support, the ROOTS team engaged in an exploration of ideas through art instead of using art to simply capture their thought processes.

EmcArts collaborated with Ariston Jacks to make a short animated video about organizational assumptions at the core of Alternate ROOTS *Innovation Lab* project. [See the video here.](#)

A major shift in assumptions for the team centered on the idea of innovation itself. As they workshopped ideas for alternative membership structures, the team realized that the project had less to do with fashioning something new and more to do with creating institutional alignment with their original values of participatory democracy, connectedness and anti-oppression, values that their strategic plan highlighted as well. “We weren’t really there to do something new, but to solidify and advance a strategic direction that was already put in place,” Turner said. “It was about not feeling pressure to create something new just to be innovative. Instead, we looked back to the Civil Rights Movement, to the history of the South, [and] to the history of ROOTS’s own formation. This allowed us to select strategies that reflected our organizational values. We connected with members not through the internet or social media, but through phone calls, through visiting someone, through ownership that’s created by one-on-one engagement.” The team also came up with a beautiful and powerful purpose statement that reflected their vision for the Lab. “We would refer to this purpose statement when things got hard,” said Jacks. “We used it as a reminder

to keep us on track.” The reframing of innovation as remembrance and return, or as going back to ROOTS’s history also served a re-energizing purpose for the team. It allowed them to pitch their proposals through the lens of strategic institutional alignment and integrity so that their new membership structure would reflect their original intentions and values instead of simply being a trendy experiment. In a society that places high value on the role of free markets and innovation as indicators of progress, looking back was in fact a radical move. “At one point during our conversations, [Executive Director] Carlton [Turner] gave us an example. He said back in the day, his grandparents used to make their own clothes and grow their own food. That used to be called poor. Now it’s called organic, green and sustainable. For our folks who have Southern roots, this was a strong analogy for us,” Minner explained.

ROOTS’s decision to launch an internal Campaign for Change focused on stakeholder engagement also produced a decisive shift in organizational practice and tested ROOTS’s own assumptions about member participation. The campaign served as an internal model—a test-run or pilot—for how ROOTS could facilitate and operationalize large-scale change-making processes that are in keeping with their values. The campaign systematically demonstrated how to have deep, sustained conversations with ROOTS members that were civil, did not get stuck in inaction, and also advanced the work. The success of the campaign in sharing information, generating trust and transparency, and soliciting buy-in from members indicated that an organizing strategy and lens was the best way for ROOTS to bring alignment and integrity to their organizational intentions, processes, and products. “In the Campaign for Change, the actual policy proposals for membership restructuring were the object, but actually, it was the whole campaign that was supporting institutional change-making,” Brunk said. “The entire campaign was supporting ROOTS in having conversations in positive, democratic ways that advanced the work on timelines and with heavy engagement and buy-in that felt qualitatively different from the approaches they had taken in recent years.”

“Right now, our structures and practices lack the necessary clarity, strategy & equity to live and accomplish our mission. This project will allow us the space and time to analyze and clarify our current practices and envision potential points of transformation and create a plan for action. As a result, all people entering the organization can live and enact the mission and vision of ROOTS and are able to move collectively towards a social order of justice, permeated by love.”

— ROOTS Purpose Statement in their *Innovation Lab*



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— Sketch by Ariston Jacks, ROOTS Innovation Team Member

The [Lab] experience reaffirmed my belief in teams and that one quality that makes a good team is diversity—intellectual, emotional and spiritual diversity. Two other reflections come to mind: 1) The recognition that innovation is prominent in artists’ daily work, and that artists already possess a vocabulary to express innovation and that their lexicon is more powerful for them than terms formulated by social scientists or innovation consultants, and 2) That a large measure of social justice innovation is remembrance. For example, our team adopted the language of Rev. James Lawson in his founding statement for SNCC (the Southern Christian Leadership Conference): The search for a social order of justice permeated by love.

— Dudley Cocke, ROOTS Founding Member

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OBSTACLES & ENABLERS

Digging into this ambitious membership restructuring process wasn't always easy for the ROOTS team, and they did find themselves in many messy conversations about institutional history, oppression and access, and conflict around the proposed changes. Overall, the team agreed that safe space was created for healthy and constructive discord, since the vision of a more diverse, accessible and responsive ROOTS was at the forefront of their efforts. Davis added that at times it was hard not to get bogged down by long-term cultural practices that weren't serving them well anymore. "We were examining these practices and asking, who was the 'we' that agreed to these mythological, engrained practices in the first place," she said. Another challenge the team dealt with was the tendency to make the same decision over and over. "We have a practice of wanting to make sure that everyone has a voice, because we always want to check for engagement and inclusivity," said McCord. "At times it felt hard to make a decision and stick with it."

"Folks were nervous about these big changes, and excited too," Brunk said. "There were concerns [about] what if it's too risky to change? What if the culture is solidified and there's too much resistance? Could ROOTS possibly make enough changes that would stick?" Brunk's experience as a non-artist organizer was an essential asset in this context because it allowed her to see the change-making and engagement possibilities through a community organizing lens. "Every conversation can be changed as long as there's a good organizing plan," she said. To address members' worries about calcified culture or resistance, ROOTS expanded General membership and access to grants and programs to members living outside of the South, even though they originally thought that there would be fears from members about losing their Southern focus. However, this turned out not to be a massive concern because the new membership policy continued to require Voting members, who carry governance responsibilities, to live in the South. "The larger concerns raised were about which view of democratic organization was right for ROOTS in this moment," Brunk explained. "If everyone is automatically a Board member, are you restricting their democratic rights by adding more responsibility, or are you protecting their democratic rights?" This core question was at the heart of most of the Executive Committee deliberations, as well as many of the *Innovation Lab* team meetings.

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— Carrie Brunk, ROOTS Campaign for Change Organizer

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In redesigning their membership policies, ROOTS was also diving into a challenge that was core to its identity—the delicate dance between honoring place-based tradition and history, investing resources in the South, and modernizing to meet the needs of diverse and growing members living in all parts of the country. For an organization that embraces change, there was also a cautious tension to make sure that they didn't leave things behind or disregard contributions of founding members. deNobriga explained that as a ROOTS elder and founding member, it was important for her to be involved in the initial phase of the Lab so that she could weigh in about historical practices. "The main barrier was the burden of history," deNobriga said. "But overall there is a consistently high degree of trust in our leadership. So we are all inclined to say, 'Hey, let's try this new experiment.'"

The level of trust between members, as well as ROOTS's practice of honoring history and building interpersonal relationships within their network, makes them a unique, compassionate, and high-functioning group. Their mindfulness about checking their decisions with all Voting members contributes to a culture of mutual respect and consistently high stakeholder engagement. The fact that the group is artist-led and artist-centered with anti-oppressive tenets at the core of its mission makes ROOTS a creative, adventurous, and fierce organization. During the *Innovation Lab*, ROOTS also re-confirmed that its biggest assets are its members who are empowered and committed to experiment alongside leadership.

IMPACTS

In the last phase on implementation, ROOTS already has a lot of their work cut out for them. Their new membership structure has the potential to dramatically change their organizational culture, while their strategic plan presents ambitious opportunities for organizational development. Since General and Voting membership categories have significantly fewer barriers to access due to year-round voting online, the ROOTS team expects that this will now attract hundreds of new members. "We're anticipating big changes ahead," said Turner. "We've received large strategic grants to add capacity, and we're expecting more applications for our grants program, more regional events, and an increase in

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We were examining these practices and asking, who was the 'we' that agreed to these mythological, engrained practices in the first place

— Ashley Davis, ROOTS Programs Director

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The question is really about our organizational culture and how membership reflects our values. We were simultaneously holding conflicting values in balance... we wanted to be small and big, tight and connected, but also broad and inclusive.

— Kathie deNobriga, ROOTS Founding Member

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participation.” Expanded programming through ROOTS membership, events, organizational partnerships and grants will have a tremendous impact on the field of socially-engaged arts, and within ROOTS’s Southern service region in particular. However, rapid growth of this sort would have to be carefully managed, since it could undermine the personable, relational and community organizing spirit of ROOTS. deNobriga captured this challenge by saying: “The question is really about our organizational culture and how membership reflects our values. We were simultaneously holding conflicting values in balance... we wanted to be small and big, tight and connected, but also broad and inclusive.” deNobriga also said that the upcoming work will be to balance quantitative increase in membership with strategies to maintain qualitative relationships—the kind of responsive, durable relationships that ROOTS has always been known for.

To manage these upcoming changes, ROOTS is already increasing their capacity and hiring new staff. They are also identifying ways to overlay and intersect changes in leadership development, staff roles and structures with these new membership policies. ROOTS is leaning into these changes with courage and passion, and a high degree of readiness for adaptive change-making. Specifically, they are leveraging the momentum, inspiration and organizational will generated through the Lab’s membership restructuring project to catapult ROOTS into expanded organizational growth and stability. There are impending questions around changing staff configurations, work-planning, recruitment pipelines, member-led personnel evaluations, and staff’s relationship to members. “The Campaign for Change experience helped with right-sizing and reorienting the relationship between staff and membership in a positive way,” said Brunk. “Staff had certain habits before that benefited from a different kind of engagement with membership through this campaign. Now that ROOTS is restructuring staff roles, they will be able to use the Lab process as a guide in proactively reshaping the staff-member connections across the organization.”

The impact of ROOTS Lab process has extended far beyond the original complex challenge of membership redesign, and is now spilling its’ transformative potential into the broader areas of staffing and strategic organizational alignment. In many ways, the Lab has enabled more congruence between ROOTS membership structures and its core values and ethos, and this

alignment translates into better systems in other areas of organizational life. Davis also believes that now more than ever, the ROOTS mission is relevant to the lives of Americans and Southerners. “These changes allow easier access to the ROOTS community—a coalition of artists, activists, culture workers, and educators working toward the elimination of all forms of oppression.” While there is still more work ahead, ROOTS members believe that their experience in the *Innovation Lab* has provided new, collaborative models for change-making in the field. From valuing remembrance as innovation, to centralizing participatory democracy, community organizing and arts-making in their processes, ROOTS has been innovating through all phases of the Lab. With its new membership policies, it is now more strongly positioned as a modernized, formidable network that is on the leading edge of the entire field of arts and activism. “ROOTS holds a big space for artists in the South—nobody else does what we do,” Minner said. Increased access to ROOTS means increased access to justice.”

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The impact of *ROOTS Lab* process has extended far beyond the original complex challenge of membership redesign, and is now spilling its’ transformative potential into the broader areas of staffing and strategic organizational alignment. In many ways, the Lab has enabled more congruence between ROOTS membership structures and its core values and ethos.

— Nayantara Sen, ROOTS Profile Writer

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EmcArts works alongside people, organizations and communities as they take on their most complex challenges. Through rigorous workshops, coaching, and labs, we create space and conditions to test innovative strategies and build adaptive cultures. Our practice is deeply influenced by the artistic process, which we believe unlocks entrenched beliefs and opens up new ways of seeing.

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