

2022 STRATEGIC PLAN





Root Cause completed a strategic plan in 2022 to help guide its work and future direction. Read below to learn more about our services, goals, and actions.

ABOUT US Root Cause is a nonprofit consulting team that helps drive transformative social change. Our mission is to empower communities to build, improve, and sustain social change initiatives that enable all people to thrive. Since 2004, we've helped over 400 nonprofits, public agencies, philanthropists, and other funders achieve their goals while advancing racial and economic equity and justice.

OUR SERVICES Root Cause supports our partners in creating strategies, structures, and processes that level-up their work and drive greater mission achievement. We do so through a web of services—each of which can stand alone or be combined with others to create a holistic approach to the challenge at hand. Our project teams are designed to meet the needs of each project, with a careful consideration of the subject matter expertise, practical strengths, and experiences of each person.

STRATEGY, DESIGN, AND IMPLEMENTATION



We help partners develop roadmaps for the future, design and launch new initiatives, strengthen existing programs and processes, and implement strategies for greater impact. Root Cause takes a hands-on approach, providing effective project management and technical assistance in operations, HR, and other functions as needed.

COLLECTIVE ACTION



Root Cause helps nonprofit service providers, public agencies, grantmakers, and other stakeholders who share a common purpose come together to design, implement, and then measure the performance of collective action initiatives.

CONTINUOUS LEARNING AND IMPROVEMENT



We help organizations, networks, and their funders determine, collect, and use data (or measures of success) to engage in processes of continuous learning and improvement. Our services run the gamut from developing performance measurement tools, processes, and systems to performing evaluation assessments, making recommendations for improvement, and providing customized coaching and technical assistance to strengthen nonprofit operations, program quality—and ultimately, outcomes.

OUR THEORY OF CHANGE

OUR PARTNERS



We help nonprofits, public agencies, philanthropies and other funders achieve their goals and work towards their missions while advancing racial & economic equity and social justice.

OUR APPROACH



While we customize our approach so that we can best meet the needs of our partners, in all projects we apply the deep strengths and skills that make the work of Root Cause exceptional. The “Product” section goes into more detail about our approach.

OUR SERVICES



With our partners, we design projects to achieve goals that support and advance the wellbeing of marginalized families and communities. We do this through our core services, as described in the “Product” section.

OUR OUTCOMES



We build the strategy and capacity of our partners so that we leave behind tangible assets, creative solutions, and sustainable approaches for achieving their goals and leveling-up their work. Through our partnership, our partners are equipped to more effectively advance their missions and serve their communities.

Our ultimate goal: long-term community impact

We aim to set our partners up for success so that the communities they work with are empowered to build, improve, and sustain social change initiatives that enable all people to thrive.

OUR STRATEGY

THE STRATEGIC PLAN

Our Strategic Plan provides guidance and accountability for our work over the next two years. There are so many ways we could deliver on our mission—the purpose of this plan is to keep us focused on those things that will have a real, sustainable impact on our partners and their communities.

FOUR CORE PRINCIPLES

Purpose, Product, People, and Process make Root Cause what it is. Our values are organized around these four core things and these values drive our strategy, our daily practices, and everything in between. In this way—and many others—we're not your average consultants. Because our values and principles shape our work at every level, we have organized our strategic plan by our four core values.

For a more detailed version of the plan, please contact us.

[CONTACT US](#)

PURPOSE



We are committed to work that is aligned with our mission and theory of change.

PRODUCT



We strive to deliver services, complete projects, and produce deliverables that are of the highest possible quality and meet the needs of our clients and communities.

PEOPLE



We know that people are central to our success and their value must be centered in our internal culture and our external collaborations.

PROCESS



We are intentional about how we acquire, integrate, tend to, and utilize our resources—both financial and human—to support Root Cause's long-term sustainability and well-being.

PRIORITY AREA

GUIDING QUESTIONS

2022 – 2023 ACTIONS

Mission

PURPOSE

- *Are we doing work that advances our vision for the world?*
- *Can we see the purpose and value in our work?*

1. Root Cause will develop a method of conducting a basic racial and economic equity analysis for all new projects. This analysis will be scaled based on the needs of the project and the resources available.
2. Root Cause will become better known for our mission-based work and our expertise in our service and content areas, measured by inquiries, opportunities, and projects that are aligned with our purpose.

Client satisfaction

PRODUCT

- *Is this client getting what they need?*
- *Are we meeting project goals?*
- *How is the relationship?*

1. We will actively solicit client feedback on all projects and achieve a client satisfaction/net promoter score of 9 or above.
2. We will develop tools, guides, and other tangible resources to share knowledge, research, and learnings about our services and how other organizations can improve their work.
3. Our advisory services team members will be engaged in continuous learning and improvement in order to deliver the highest quality of products and services.

Team well-being & satisfaction

PEOPLE

- *Is our team getting what they need from Root Cause to feel our best and do our best work?*
- *Are we getting what we need from one another?*

1. Root Cause staff are satisfied with their roles and working conditions (with all staff indicating satisfaction at 90% or above in a regular staff survey to be developed and fielded).
2. We select vendors and consultants with a process and results that are aligned with our diversity, equity, and inclusion values.
3. Our documented policies/protocols for making decisions about promotions, compensation, and benefits reflect our values about equity and how we treat people.
4. We will reassess and codify Root Cause's hiring practices to ensure that they yield a diverse team of staff.
5. We will reassess and codify Root Cause's onboarding process to ensure that it prepares staff for success and is inclusive and welcoming.
6. We will diversify our Board and formalize the Board's role, structure, and meeting schedule.
7. We will revamp our performance evaluation process to ensure that staff have ample input for learning and development over time and that feedback is shared between co-workers regardless of supervisory relationships.

Sustainability

PROCESS

- *Are we meeting our financial goals?*
- *Do our processes serve our purpose, product, and people?*

1. We will end 2022 with five months of cash on hand (what we call a Finance KPI of 5) and a projected 5.0 KPI for the first 5 months of 2023.
2. In 2022, RC Staff will be at 60% or higher average billable utilization with an increase to 65% in 2023.
3. We will strive to ensure all projects are well-budgeted and that staff do not over or under-spend financial resources and capacity against project estimates.
4. We will clarify and codify a common understanding of how we work together as a team and capture that in written documents of norms that are accessible to all.
5. We will design and implement an approach to distributed decision-making that gives every staff person an opportunity to learn and to lead.
6. We will incorporate new language and messaging from the Strategic Plan onto our website and into newly developed marketing collateral, templates, etc.
7. We will promote our team's skills and experiences and highlight our strengths to external audiences in order to meet more like-minded partners.
8. In 2023, we will increase our capacity to take on new projects by winning more projects, hiring additional project-focused staff, and increasing annual revenue to \$2.8 - \$3 million.

OUR COMMITMENT TO RACIAL & ECONOMIC EQUITY AND SOCIAL JUSTICE

ROOT CAUSE BELIEVES IN THE RIGHTS OF ALL HUMANS to have access to basic needs such as food, shelter, and healthcare; we also believe in their right to safety, and their right to thrive in loving and well-resourced communities. Over our history, our clients and partners have primarily focused on those rights and needs and our success is pinned to theirs through our support of their work.

Structural racism and growing income and wealth disparities in the U.S. mean that communities of color and those struggling to make ends meet are vastly over-represented in populations receiving social services. What this means is that high quality in any area of our work can't be achieved without a strong, explicit, and organization-wide commitment to racial and economic equity and that this commitment is demonstrated through everyday practices and our overall approach.

People in the United States also continue to face discrimination and harm because of gender identity, sexuality, religion and disability. Rather than building on the progress of the struggle for equal protection under the law, new discriminatory laws are being passed that roll back that progress and endanger people in their own communities. Further, crises like pandemics, weather emergencies, and other disruptions also have a greater impact on people who live in poverty and face other kinds of discrimination and inequity. The negative effects of climate change are being felt everywhere, and we know that the challenges will have an exceedingly disproportionate impact on communities that are already suffering from racism and economic inequality.

We activate our commitment to racial & economic equity and social justice by intentionally shaping (directly or indirectly) how decisions are made in our areas of influence to direct money, time, capacity, and other resources towards greater equity and justice. This includes our internal decision making, the decisions of our clients, their funders, the communities in which we work, and the systems we work within.



There is a need in the market for a firm that values racial equity and centers the people being served.

Want to learn more? We'd love to connect!

Contact Executive Director, Erin Rodriguez,

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