



2022

# Roots & Rivers Annual Report

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# Message from the Directors

It's been an exciting year for Roots & Rivers. We have grown our team, served 20 new values-aligned clients, and strengthened our internal systems all while navigating a leadership transition as Annelies took maternity leave, trusting Hayley to lead the organization in her absence. This year has validated the strength of our approach and demonstrated the care our team and ecosystem members bring to our work together and with our clients.

2022 was our first year delivering on our 2022-2025 Strategic Plan. This guiding document has solidified our priorities, focused our efforts, and supported us to dream bigger about the future of Roots & Rivers. This annual report continues a tradition of sharing highlights of what we have accomplished internally alongside client success stories.

As always, we are committed to building a world that works for all. We are grateful to be on that journey with you.

Take good care,

Annelies Tjebbes & Hayley Rutherford

# 2022 Highlights



## January

- Grew our network of skilled collaborators in Canada and internationally (USA, Netherlands)



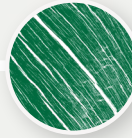
## February

- Eric Woodward Foundation Strategic Plan



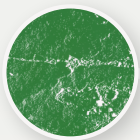
## March

- Venture for Canada Strategic Plan



## April

- Hired Janani
- TELUS Health for Good Mobile Health Clinic Evaluation
- McConnell Foundation Climate Action Portfolio Evaluation
- NewToBC Community Dialogues



## May

- First team retreat
- Vancouver Foundation Systems Change Granting Facilitation
- Nanaimo Food Share Strategic Plan



## June

- Britannia & Vancouver Latin American Cultural Centre Cultural and Non-Profit Hub Engagement Process



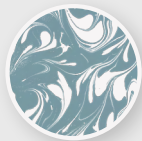
## August

Hired Hayley •



## October

Venture for Canada Operational Plan •  
Annelies started maternity leave •



## December

BC Chiropractic Association Strategic Plan •  
Mid-Main Community Health Centre Strategic Plan •  
Britannia Board Priorities Setting Facilitation •  
BC Teachers Federation Executive Committee •  
Priorities Setting Facilitation

## July

• Vancouver Coastal Health Regional Mental Health and Substance Use Strategic Plan



## September

• Small Economy Works Strategic Plan  
• Kettle Society Strategic Planning  
• BC Public School Employers' Association Strategic Plan



## November

• Coquitlam Public Library Strategic Plan  
• Canadian Women's Foundation Economic Development Grant Management  
• Midwives Association of BC Board Retreat Facilitation



# Our Team

In a year marked by transition, our team has provided incredible support to Roots & Rivers and our clients. We are grateful to work in this skilled and caring community.

## Staff

Our staff enable Roots & Rivers to steadily grow its capacity and capability.



**Annelies Tjebbes**  
Founder



**Hayley Rutherford**  
Interim Executive Director



**Janani Ravikularam**  
Junior Consultant

## Ecosystem

The expertise and networks of our ecosystem of specialized subcontractors contribute to our ability to work deeply with communities, expand our reach and solidify our impact.

In 2022, we worked with:

- Shawna Zegarra  
Zeda Virtual Assistants
- Marialejandra Reyes  
Expansion Works
- Lewis Muirhead  
Alternate Futures
- Kareen Wong  
Kareen Wong Consulting
- Tara McNearny
- Andrea Oakunsheyld  
Oakunsheyld Consulting
- Neha Bangar
- Marleen Roozen
- Eliane Bowden

# The Roots & Rivers Ecosystem



*"The Roots and Rivers Team are strategic, hard-working, and to the point. It was such a pleasure working with them over an 18-month long series of projects."*

- Venture for Canada



## Meet Janani Ravikularam

Janani is a racialized settler on the stolen homelands of the hən̓q̓əmiṇ̓əm and Skwxwú7mesh speaking peoples, in what is currently known as Burnaby. She holds a BA in health sciences and a minor in social justice from SFU, and brings experience in equity driven research, analysis, and facilitation. She was the peer leader at a youth-driven non-profit for 3 years, where she delivered and supported the development of social justice workshops to diverse groups, including offerings on anti-racism, income inequality, and food justice. As a racialized young woman, she is committed to centering care, access, and the safety of BIPOC people in her work and life.

Janani joined Roots & Rivers in April of 2022 and quickly became an integral part of our staff. Her insightful and caring influence can be felt across our processes and projects. We asked her to share some reflections on her experience so far.

## When we talk about our approach, what comes to mind?

As facilitators, we believe there is deep wisdom that exists within each group, and that it's our role to hold a space to uncover it. Whether it's for strategic planning, community input, or other processes, we help move groups through complexity and hold space for tough conversations.

We do this recognizing that these tough conversations are often places where cohesion and transformation can come through, and it feels meaningful for us to be able to support diverse teams to build impact through dialogue.

## We say we leverage systems change, can you give an example?

When thinking about systems change, we know that we can support meaningful impact when we listen to the approaches that already work for communities and build on existing strengths. As we dive into our data collection process, we maintain an action-oriented focus on the work, to ensure our learnings are shared with the wider community.

## What has struck you as a real Roots & Rivers method?

Roots & Rivers leverages Participatory Narrative Inquiry (PNI) as a methodology in which we've grounded our evaluation projects. PNI is an approach that uses storytelling to uncover insights, and upholds people as the experts in their own experience and the owners of the stories they share.

This fall, we worked with the Kambo Energy Group to look at the impact of their Empower Me program - Canada's only energy conservation and education program designed by and for diverse and multilingual communities across the country.

By using storytelling as a tool for folks to share their experiences in an accessible and consent-based way, we uncovered rich stories on how the Empower Me program impacts individuals and the systems they navigate each day.



# Our Approach

Our mission is to support social purpose organizations in designing and implementing effective solutions to complex challenges facing their communities. To do this, we navigate complexity by staying grounded in our five core values:



## **Respect the Foundations**

We build on what's working.



## **Solidarity & Listening**

We bring a lens of equity, diversity and inclusion to all our work.



## **Courageous Reflection**

We believe that personal reflection and growth are key to social change.



## **Focus On Impact**

We put social, environmental and community impact are the core.



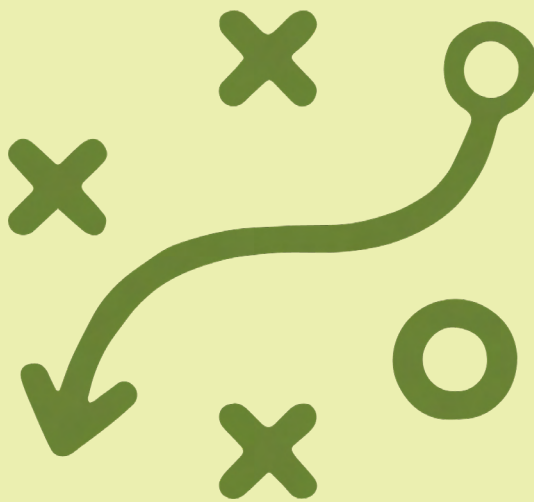
## **Patient Urgency**

We approach our work with the diligence needed to address pressing issues.



# Our Services

We support social purpose organizations because we believe in the potential of local change initiatives to create ripples of positive impact. Through our core services – strategic planning, evaluation and facilitation – we help our clients find clarity on their goals, see what’s working (or not working) and dream big about what is possible.



## Facilitation

In 2022, many organizations prepared to convene in-person for the first time since before the pandemic. Whether it was a long-standing team reconnecting or newly-formed teams that had only ever engaged online, we noticed an increase in requests for facilitation support for organizations to navigate group dynamics and to create space for generative conversations.

Through the seven facilitation projects we supported this year, we saw the importance of **reflecting on existing work**. Particularly in the fall of 2022, we supported clients as they met in-person to think deeply about their progress on their strategic plans and equity, diversity and inclusion work in order to set clear priorities for the year ahead.

We also had experiences **filling fractional roles**, providing support to clients as they transitioned between staff members. This allowed us to become part of their teams, build strong relationships and develop a deep familiarity with their work.



## New To BC Community Dialogues

New to BC is a library settlement initiative that connects newcomer immigrants and refugees with essential settlement information, public libraries, other service provider organizations, and, ultimately, BC communities. In collaboration with PEERs Employment and Education Resources, Roots & Rivers designed, developed and facilitated nine community dialogues sessions. In these sessions we connected library and settlement staff, newcomers and community stakeholders in exploring issues related to newcomers and service provision in an ongoing COVID context.

*"We thoroughly appreciated Roots & Rivers collaborative approach, their engaging development process, and their focus on timely outcomes and deliverables. We enjoyed working with them to see all of the NewToBC Community Dialogues come to fruition."*

- Jody Johnson, Principal  
PEERs Employment  
and Education Resources



## Strategic Planning

As organizations have found some sense of normalcy after two years of responding to crises, we have seen an increase in organizations re-evaluating their pre-pandemic strategic plans or beginning new strategic planning processes after a gap.

We co-created 13 strategic and operational plans with our clients in 2022. Throughout the year, we grew our skills **integrating equity-focused work into strategic planning**. Since 2020, many of our clients have undertaken equity-focused work, including equity, diversity and inclusion audits and active anti-oppression and anti-racism work. By codifying this critical work in strategic plans can support organizations to focus on and resource these actions.

We learned that we can support our clients to **remember what worked, and leave behind what didn't**. Strategic planning is a reflective process, giving space for our clients to consider revitalizing pre-pandemic processes that were valuable and are missed, while leaving behind those that were onerous or unhelpful.

## Strategic Plans

Strategic plans are the most publicly available of the resources we produce with clients, we're excited to share those plans with you including:



### **Small Economy Works 2022-2025 Strategic Plan**

Small Economy Works connects people in mostly northern communities to the latest in skills training, education and innovation support through an asset-based approach to create economic, social, and community resilience.



### **Coquitlam Public Library 2023-2026 Strategic Plan**

Coquitlam Public Library (CPL) is a public library in the City of Coquitlam with two branches and a mobile library (the Library Link). CPL has held a strong reputation for commitment to the community and serves a wide demographic providing specific services for children, teens, newcomers, English language learners, foreign language speakers and print disabled.



### **BC Public School Employers Association 2023-2025 Strategic Plan**

British Columbia Public School Employers' Association is an employers' association and accredited bargaining agent for BC's public boards of education. They provide human resource services with a focus on the development, coordination and facilitation of human resources best practices.



## Evaluation

Storytelling has been a hallmark of our approach evaluation, and we continue to be heartened by how organizations have embraced and celebrated these methods. In an increasingly complex world, narratives provide an accessible and approachable way to understand impact.

We completed three evaluation projects in 2022, including the largest-scale evaluation our team has taken on. The importance of **building trust** to connect safely and appropriately to the community members who participate in our clients programs and initiatives was reinforced. Our clients play a critical role in supporting this process and bridging us to their communities.

The end result of our evaluations are often confidential or sensitive documents meaning that the important stories that are uncovered remain within the organization. Increasingly, we are navigating how to support clients who wish to share insights externally, **telling stories about stories**, while maintaining strong consent and reporting processes.

## TELUS Health for Good Mobile Clinic Evaluation

The TELUS Health for Good program partners with innovative social medicine providers across Canada to enable the delivery of primary health care and mental health support services. Working together, they offer health outreach services through Mobile Health Clinics that address specific needs within communities, supporting people to access low-barrier care.

Roots & Rivers designed and delivered a national program evaluation by diving deep into the experience at five Mobile Health Clinics (MHCs) in five different cities. By using Participatory Narrative Inquiry, an approach that recognizes storytellers as experts in their experience, we have gained meaningful insights into how TELUS Health for Good's MHCs have facilitated access to primary care.

Some insights from the evaluation are publically available on the [TELUS Health For Good website](#).

*"The Roots & Rivers team did a great job of creating and executing an evaluation of our program in an engaging, respectful and accessible manner. They were responsive, flexible and always willing to incorporate feedback to ensure that the evaluation process was streamlined and truly reflective of the qualitative and quantitative data they captured. I would be happy to work with them again in the future."*

- Rory Marck, Mobile Outreach  
Program Manager  
Kilala Lelum Health Centre



# Our Impact

Roots & Rivers has been operating since 2018, which means that more and more we are understanding the impact our projects have had over time. In 2022, we reconnected with some past clients to check in.

*"[The strategic plan] has helped to keep staff on track, and the operational plan has been very well received by our board."*

- College of Opticians of BC

*"Our strategic planning session with Roots & Rivers was instrumental in setting the stage for our rebrand launch and helped our organization re-define "who we are" and "what we do". The resulting document [strategic plan] has been a critical piece as we move forward, poised for growth and expansion."*

- Langley School District Foundation

*"The training program and curriculum development will continue to be an important program for the growth of Binnars' Project and the growth of the binnars we serve as well. While we have not been able to reimplement the training program this year due to staffing turnover and capacity, we have seen many binnars that were brought on as staff to participate in the original training program continue to grow with the project."*

- Binnars' Project

# Our Strategic Plan

Our current strategic plan sets our priorities for 2022-2025. Let's reflect on our first year of implementation. Last year we invited you to read the [complete Strategic Plan](#) and to help hold us accountable to the transformations we seek to create in the world. This invitation still stands.



## Deliver excellent services

**Deepen our expertise and refine our values-aligned methodologies for serving clients.**

We continuously reflect on our projects in order to course correct when needed and to improve our approach to future projects. As the Roots & Rivers has grown and changed this year, we have actively incorporated insights from our team and ecosystem to reflect their expertise and insights into how we serve our clients.



## Deepen our principles

**Take on internal work, and support action across the social purpose field, to challenge white supremacy and decolonize tools and practices.**

We have provided financial support to our team and ecosystem members to take on values-aligned professional development and integrate those lessons and tools into processes and projects.



## Act as a field catalyst

**Contribute towards thematic discussions and action on focus areas that will meaningfully address society's most pressing issues.**

We have reflected on areas where our team has developed expertise (including supporting professional healthcare networks and associations, community health centres and mobile health care clinics) with an intention to develop this role in the last year of the strategic plan.



## Solidify our foundation

Expand the infrastructure and operational processes that will help us best serve our clients, our team, and our impact.



Annelies' transition to maternity leave made this goal our top priority as we worked to more fully translate her knowledge into our processes, policies and procedures. We have engaged a human resources firm and financial coach, in addition to existing service providers to better support our organization. We have developed and documented robust onboarding and transition processes and continue to explore how we can make our operations more efficient.

## Scale our efforts

Broaden our reach to support organizations globally in their quest for transformative change.



We have grown our ecosystem to include members in the USA and the Netherlands. While their current work supports our Canadian clients to build familiarity with the Roots & Rivers approach, we hope to leverage their networks to take on projects in their communities.

# What's Next?

As we begin to engage with new clients and projects, we're noticing that 2023 is shaping up to be a reflective year with many organizations looking to explore evaluation work or to reignite strategic planning processes. We're looking forward to welcoming Annelies back from maternity leave and co-creating a new team environment that is supportive and adaptive.

# Conclusion

2022 was a big year of preparation, transition and growth. We're grateful for everyone who contributed to this pivotal year for Roots & Rivers and are excited for what's to come.

# Our Clients

