



THE ROOTS FUND

2021 ANNUAL REPORT



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A MESSAGE FROM OUR LEADER



Dear Friends,

It is with great pleasure that we share the work of The Roots Fund this past year. Our nonprofit organization is dedicated to nourishing and enriching the lives of communities of color in the wine industry. In 2021, at the height of social justice, the wine industry was put on the forefront to create equitable change. Many companies spent a lot of time taking systems apart, figuring out how they created an isolated environment for diverse communities. The Roots Fund stepped up as an educational resource and a future of change.

At The Roots Fund, we believe that diversity and inclusivity are essential to the success of the wine industry. Our mission is to empower people of color in the wine industry by providing resources and financial support, through educational scholarships, wine education, mentorship, and job placement. Our commitment to invest in education and mentorship will lead to more wine business professionals. By doing so, we hope to create a more equitable and just wine industry.

Our work is focused on building strong accountable partnerships, creating opportunities for professional growth, and providing a supportive community for individuals of color in the wine industry. We believe that by working together, we can achieve our mission of creating a more diverse and inclusive wine industry.

Thank you for your interest in The Roots Fund. We look forward to working with you to achieve our shared goals.

Sincerely,
Ikimi Dubose, President

MISSION + VISION

The Roots Fund was created to empower communities of color by providing resources and financial support through educational scholarships, wine education, mentorship, and job placement. The Roots Fund is committed to investing in communities of color to provide opportunities to those seeking a career/education in all aspects of wine.

BOARD MEMBERS



IKIMI DUBOSE
Board President

Destined to be a lawyer to help her Brooklyn community, Ikimi ended up in Culinary school by accident. She grew as a leader and mentor in the culinary world, which also fueled her passion to bring diversity to the wine industry.



CARLTON MCCOY JR.
Board Chairman

Carlton earned the title of Master Sommelier in 2013 at just 28 years old, one of the youngest people and the second African American to earn this prestigious title.



TAHIIARAH HABIBI
Director

Tahiiarah Habibi is an esteemed Sommelier, Founder and Executive Director. Born and Raised in North Philadelphia, Tahiiarah has always had a passion for uplifting the community.



JEREMY SEYSSES
Director

Once president of the Oxford wine circle and current owner of the family's wine business, Jeremy is acutely aware of the many barriers that people of color experience in his industry - and ready to change that.

CHECKING THE INDUSTRY CLIMATE



<5%

is people of color in ownership in wine



>10%

of wine drinkers are people of color

85%



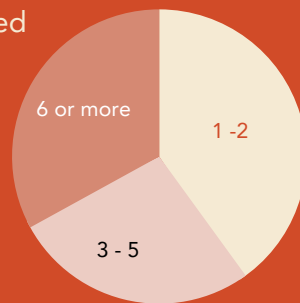
of the vineyard workforce is people of color mainly Hispanic/Latin

SURVEY

In 2021, The Roots Fund conducted a survey of the community and their experiences working to access careers in the wine industry. Our survey reinforced the need for change:

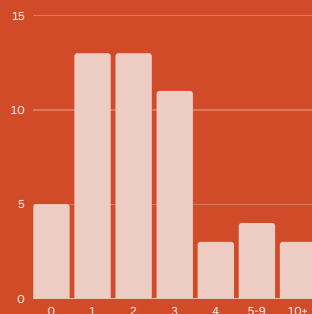
How many jobs have you applied for in the last 2 years?

- 1-2 = 40%
- 3-5 = 27%
- 6 or more = 33%



How many interviews came from these jobs?

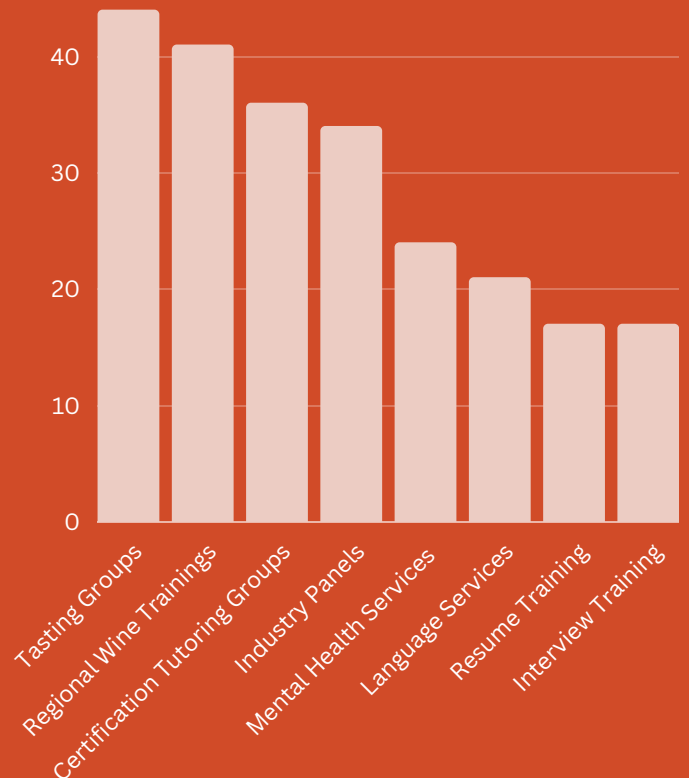
- 0 interviews = 5
- 1 interviews = 13
- 2 interviews = 13
- 3 interviews = 11
- 4 interviews = 3
- 5 - 9 interviews = 4
- 10+ interviews = 3



During the interview, were there any DEI or company culture initiatives discussed?

87% said "No."

What programming would you like to see from the roots fund or more you'd like to see?



CHECKING THE INDUSTRY CLIMATE

Question: What do you think the wine industry needs to do to attract communities of color?

"Wines are diverse. They carry so much history and have evolved through time. Different cultures and the BIPOC community carry the key to reflect that evolution. Instead of wines being one track minded, we can now be open minded and understand how they are appreciated, perceived, and enjoyed by different cultures."

"Exactly what the Roots Fund is doing, I've never experienced such an awesome organization who is not only holding people accountable but are actively engaging people within the wine world to expand their mind and work model to include all BIPOC. I believe all areas including distribution, sales, vineyards, etc. need to take a page out of The Roots Fund book and make a change! As long as they believe in the change that needs to be made, because if they don't believe then it's not meaningful and is not a genuine change. Their marketing needs to change and the faces behind their brand and company need to be more inclusive."

"Access is the big key for me. It's almost like the wine industry is a paywall. In certain circumstances, that's ok and it works. But for people like me, having the access is everything. There shouldn't be this paywall to get us in the industry. I think we're beginning to see how deserving we are to be here, but to make it easy on the rest and the new people wanting to get in, don't block the access."

OUR PROGRAMS



MENTORSHIP

Every scholar is mandated to have a mentor in our programs. We believe in a reverse mentorship process, so as the scholar is learning about the wine industry, the mentor learns about their life experiences. We encourage mentors to connect through happy hours, and online forums to improve their conversations. Mentorship moves the needle. Those who have great wine knowledge can share their methods for success. These monthly conversations will shape the future of our aspiring wine minds.



CAREER

Utilizing our connections in the industry, we have secured dozens of wineries, retailers, restaurants, and distributors that have committed to hiring Roots fund students with the appropriate qualifications. We are well aware that recruitment and education do not carry value if we can not assist with job placement. Our organization goes through resume repair, interview training, and providing tips and tools in work environments. We make it a point to align with businesses doing true DEI work. Partnering triggers a level of accountability, that is unheard of in the current hiring processes.

EDUCATE

Our fund is based on charitable donations from individuals, organizations, wineries, and educational institutions. Quality education is a necessity to arming these students with the tools they need to be successful in this industry. We focus on scholarships to the most elite oenology and viticulture institutions, HBCU's, as well as independent business schools, and WSET to provide quality education to our candidates that will help to ensure the skills necessary to play an active role in the wine industry.



2021 HIGHLIGHTS

STEP (STUDY, TASTE, EDUCATE, PROSPER)



In partnership with Southern Smoke Foundation, The Roots Fund presents STEP (Study, Taste, Educate, Prosper). The program, which is co-owned by Southern Smoke and The Roots Fund, grants annual scholarship funding to support individuals of the BIPOC community seeking high-quality education as they prepare for certifications in all aspects of wine. Scholarships are awarded via the Wine and Spirit Education Trust (WSET). We're proud to share that the Southern Smoke Foundation has granted The Roots Fund \$80,000 to support this effort in 2021.

Southern Smoke is a nonprofit founded and powered by current and past food and beverage workers that is dedicated to creating a meaningful safety net of support that doesn't exist for most people in the world.



MENTAL HEALTH SERVICES

During 2021, we entered year two of COVID. Time and again, our team noticed that the clients we interacted with were struggling mentally and emotionally. While some had access to therapy through insurance or other means, many simply could not afford it. Our team set to action, activating mental health professionals across the country to donate more than a thousand hours of mental health therapy sessions online. Nearly 50% of those we worked with during 2021 were using these services. We intend to evolve this program into a constant pillar of our work.



BURGUNDY SCHOOL OF WINE & SPIRITS BUSINESS

ROOTED IN FRANCE SCHOLARSHIP

In 2021, The Rooted in France Scholarship was launched. The scholarship, sponsored by Domaine Dujac & Friends, BSB Foundation, Kermit Lynch and Wine Spectator, was created to provide an educational experience for HBCU students/alumni pursuing Bachelor's degrees. The Roots Fund saw an opportunity to create awareness around the wine industry, through the Black college community. Most HBCUs have agriculture and business programs that correlate to the wine industry. Our goal was to build a bridge, and we did.

Led by Dr. Jérôme Gallo, the Burgundy School of Wine & Spirits Business is in the top 1% of business schools around the world. The Masters/MBA of Wine focuses on wine business, entrepreneurship, advanced WSET courses, and management skills. The Master of Science in Wine Management (MSc) program allows students to obtain a global vision in the wine industry and also gain management and financial skills in spirits and beer industries.

Scholarship recipients have the opportunity to gain their Masters of Science in Wine Management and/or an MBA in Wine. The MBA program is geared towards post-graduates with professional work experience, while the MSc program is a great fit for the aspiring professional.

Cherita, a proud Grambling graduate was awarded a full scholarship to The Burgundy School of Wine & Spirits Business in France, to pursue a Master of Science in Wine Management and an MBA in Wine & Spirits business. Learning alongside some of the most passionate people in the industry, while creating everlasting relationships to advance their careers in the world of Wine & Spirits. The scholarship is open on December 1st.

EMPOWERING FUTURES

Quotes from a selection of our 2021 Scholarship recipients:

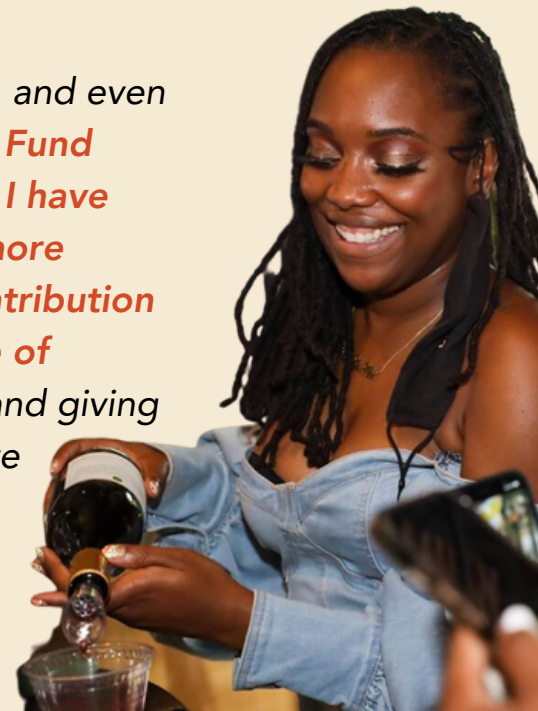


*"The Roots Fund scholarship has helped me to start my WSET Diploma. In addition to financial support for wine education, **The Roots Fund has provided me with a mentor and a supportive community. The opportunities, connections, and guidance have been life-changing.**"*

- Desiree Harrison-Brown

*"This industry can be intimidating for women, and even more so for black women. But **being a Roots Fund scholarship recipient means I have support, I have access, and I matter in this industry. I feel more confident as I navigate and discover my contribution to the world of wine now that I have a tribe of supporters.** I look forward to doing my part and giving back to the future Roots Fund recipients so we can continue to bring diversity and inclusion to the world of wine.*

- Aamira Garba, Scholarship Recipient





"The Roots Fund education scholarship has allowed me to expand my wine education and competence outside the lab. I have been able to start building a wine community that is greater than I would have imagined, connecting with other people in the program who share a passion for wine. The support from the Roots Fund encourages me to keep pressing forward and will allow me to continue growing through valuable mentorship and professional connections."

- Rachel Allison, Scholarship Recipient

"This [opportunity] has built and will continue to build confidence and enhance my network, not just through wine but through life as well."

- Cherita, Scholarship Recipient

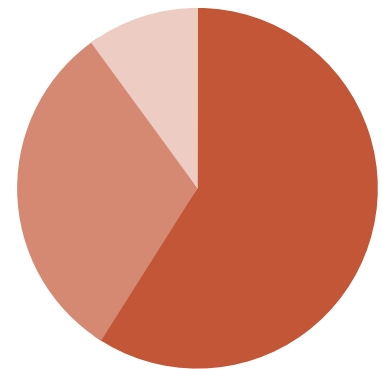


FINANCIAL REPORT

The Roots Fund works extremely hard to keep our finances directed to program work and impacting those we serve. For example, our office space is donated and our team works remotely to keep overhead low. Plus, as we get off the ground we've been lucky to have many volunteers doing the work necessary to grow our mission.

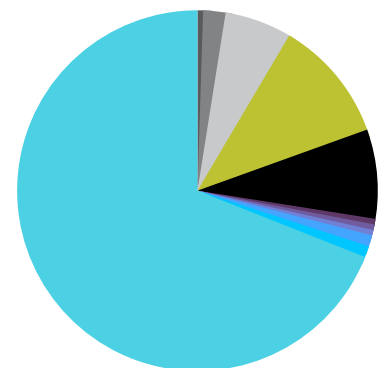
INCOME: \$415,798.25

- Individual and Corporate Donations: \$347,830.49 (59%)
- Total scholarships awarded: \$185,001.98 (31%)
- Stripe Donations: \$60,217.76 (10%)
- In Kind Donations: \$380.00 (<0.5%)



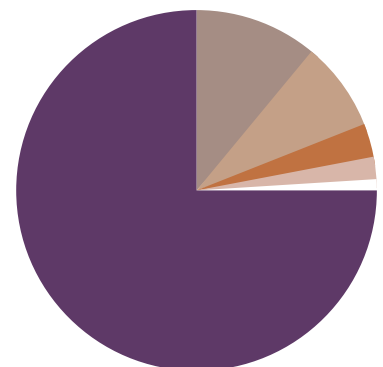
EXPENSES: \$420,349.48

- Accounting: \$1,556.55
- Advertising & Marketing: \$10,695.66
- Consulting: \$23,244.95
- Payroll: \$42,831.42
- Travel: \$32,233.06
- Staff Training: \$5,497.50
- Grant Writer: \$2,094.33
- Rent & Lease: \$1,316.61
- Insurance: \$8,177.12
- Meals & Entertainment: \$6,751.88
- Scholarships: \$292,405.77



SCHOLARSHIPS AWARDED: \$292,405.77

- Rooted in Napa: \$30,855.85 (11%)
- Rooted in France: \$22,570.10 (8%)
- A Vintner's Story: \$9,448.07 (3%)
- Rooted in Culture: \$4,744.39 (2%)
- Mental Health Services: \$2,150.00 (1%)
- General Scholarships: \$222,637.36 (75%)



THANK YOU

Individual donors are vital to our ongoing cause, and our organization has thrived from day one from generous donations from people and the community. Thank you to all the following individuals who've supported our work:

Matthew K Elmore
C Christensen
Todd Lefkoe
Amy Jo Benavides
Reed G. Bergwall
Miriam Leon
Mercedes H Williams
Brian Schmidt
Bruce D Gray
Melissa D Casteel
Paul Stroud
Bradley W Lyons
JOHN VIRUET
Michael E Gilman
Ken Lysen
Susan H. Goldberg
Erin Cannon Imports
David S Farmer
David Sorgen
Manuel Abascal
Todd Hauptli
Kaylon Beck
Samantha Sedivy
Kandace Massenburg
Shitty Wine Memes
Donisha Robinson
Ryan Champion
Roslyn Griffin
Ayanna Antoine

Continuum Estate
Monica Jones
April Watkins
Dusty Nabor
Mary Barth
Oladebi Brisibe
Michelle Day
Isaiah Headen
Jasmin Clyne
Scott Price
US Natural Wine
David Gates
Together With Wine
Tiffany Riggs
Brian Handy
Cynthia Bullock
Austin Jones
Sam Walker
Yolanda M
Monique Arenas
Whitney Pope
Nicole Mallari
Edward McKnight
Alex Fenkell
Hugh McLaughlin
Wendi Cherry
Claudia Fuentes
Kathryn Holmes Johnson
William Moy
Artensia Nunley
Robert I Glimcher
Rebecca Jain
Jennifer Carruthers
Chris Tanghe
Krista Jules
Damian Baxter
Shaquay Peacock
Vanessa Raymond
Jessica A. Tinajero
Ebony Quinones
Desiree Harrison-Brown
Rebecca Orozco
Nick Lenwerke
Amy Benavides
kent callaghan
Robin Nguyen

Tosja Goodnight
Lisa R Sheppard
DeLauren Everett
Raquel M Romero
DeLauren Everett
Nancy Murray
Jesus Penalzoa
Cameron Seward
David Thompson
Annette Alvarez-Peters
Scott Webster
Marvina Robinson
Allen and Margaret Hart
Mara FitzGerald
Matilda Schroeter
Christina Edwards
Inez Ribustello
Balkis Johnson
State Department Federal
Credit Union
Jennifer Carruthers
Naomii Tringali
Corey Schuster
Continuum Estate
Monica Jones
April Watkins
Dusty Nabor
Mary Barth
Oladebi Brisibe
Michelle Day
Isaiah Headen
Jasmin Clyne
Scott Price
US Natural Wine
David Gates
Together With Wine
Tiffany Riggs
Brian Handy
Cynthia Bullock
Austin Jones
Sam Walker
Yolanda M
Monique Arenas
Whitney Pope
Nicole Mallari
Edward McKnight
Alex Fenkell
Hugh McLaughlin
Wendi Cherry
Claudia Fuentes
Kathryn Holmes Johnson
William Moy
Artensia Nunley
Robert I Glimcher
Rebecca Jain
Jennifer Carruthers
Chris Tanghe
Krista Jules
Damian Baxter
Shaquay Peacock
Vanessa Raymond
Jessica A. Tinajero
Ebony Quinones
Desiree Harrison-Brown
Rebecca Orozco
Nick Lenwerke
Amy Benavides
kent callaghan
Robin Nguyen

Bertha Cervantes
Cara Bertone
Amy Jo Benavides
Christopher Rivera
Tasha Hill
Brendon hernandez
Fernanda Arredondo
erin szrankowski
LAllegro Smith
Colin Francesco
Sarah Tuttle
A Cork in the Road, LLC
Kyle Sleeper
Stephanie Thompson
Sharitta F Gross
Wendy Brown
Mailynh Phan
Victoria Parrish
Mark Edwards
Tammy Gordon
Kingsley Nlewem
Yolanda Davis
Isolina (Soul Seeker)
Tyrone Davis
Kyle Lynette Burke
Torrey Grant
Kate Graham
Rachel Halbach
Charnita L Robinson
Michael James
Alexa D'Acquisto
Jordan Gooden
Henry Thomas
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Kelli Becote
James Molesworth
Jessica Outer
Erica D McGrady
Elizabeth Silva
Daniel Rastein
Aamira Garba
Eric Asimov
Kyree Clarke
Robert Whelan
Denise Matthews
Denise Matthews
Scott Merrick
Irma Toscano
Brian Handy
Christopher Hoel
Mitzi Inglis
Mike Cline
Cereese Wills
Teresa Delfin
Matthew P Joseph
Monica Jones
Grace B
Uncorked and Cultured, LLC
Nikkia Young
Tiffannie Jones
Shayna Wells
Patrica Joshaway
John Fries
Janelle Freeman
Kimberly Bell
Josephine Hart
Kaela Wuesthoff
Kathleen Payne
Anita Musgrave

Leslie Frelow
Deborah seward
Chelsea Daniels
Kathryn T Sadlosky
Elyce Ruiz
Nathan Sneller
Sydney Love
Ashley Rawlinson
Echo McCain
Kristina Newell
Trois Noix
Jaime Araujo
Rafaella De La Vega
Jonathan Ashley
Monique Cooper
Kathleen Connolly
Tosja Goodnight
Amy Karasavas
Erica McGrady
Miriam Leon
Heather Luig
Nikki Handy
Olivia Hooper
LaKisha Council
Taj Clark
Yolanda Martin
Toria Edmonds-Howell
Mercedes H Williams
Bayyinh Lyons
Sedale McCall
Jade Boykins
Rachael Davies
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Felicia Woytak
Lindsay Perry
Travis Cobb
Jon'll Boyd
Sophia Carrillo
Denita Smith
Danielle DiBlasio
Caroline Bamforth Firman
Julie Vernick
Sara Clark
Imbibe Media
Jaime Dutton
Jason Price
Julie Confer
Amanda Joffee
Jeremy Weiss
Alison Scofield
Aamira Garba
Luis Miramontes
Elyce Ruiz
Eliezer Carreon De La Rosa
Cereese Wills
Kerrie Despotopulos
Alison Fraser
Amanda Joffee
Kerrie Despotopulos
Amanda J
Crafted Hospitality
Cameron Mills
Dean Kirkpatrick
Justin Violini
Nikki Shirley
Jessica Waugh
Sedale McCall

Mia Yeoman
Jacob Drummond
Sharon Nixon
Ann Hunter
Ketmany Saycocie
Fred Miranda
Elizabeth Giusti
Melissa B
Kerrie Despotopulos
Konda Berry
Renada Dukalskis
Joan Jackwood
Elaine Harding
William Nadel
Andrea DeLuca
Stephanie Livesey
Wanda Sue Brady
Sabine Schuetz
Karen Rosd
Alexandra Farren
Carolina Laise-Chong
Margaret Boscardin
carol cook
chris drake
Traci Collins
Jana Fant
Diane Pease
Jill Heddleson
Michael Osborn
Michelle Jeng
Dana L Lucas
Shelley Lewis
Becky Heil-Cunningham
Logan Ross
Nancy Perrizo
In Good Taste Wines
Robert H. Bohr
Jen Walraven
Megan Currie
Matthew Gabbard
Chris Hughes
Alan Factor
Kenneth Kailin
Rebecca Friedlander
alan snitow
Mark Fister
Timothy Moll
Katharine Hooper
Ashley Bell
Amanda Paikos, Oliver Winery
Nadim Audi
Eric Harms
Erin Coburn
Charlotte Yvonne Reid
Michael Accurso
Josh Abramson KSS Wine LLC
Nicole Schumann
Charlotte Yvonne Reid
brooke blumberg
Rachel Allison
Morning Star Darling
Teresa Bolden
DJ MANNING
aron Lester
Izabela Babinska
Melissa Monosoff
Susan Thornett
Ahmun Williams
Ruchir Nanda
Tanya M

A
Alison Scofield
Belinda S Mark
Anna-Lisa Campos
Vanessa Raymond
Woong Chang
Vanessa Raymond
Charlotte Yvonne Reid
Maryellen Burdge
Robert Kenyon
Daniel Munger
Jonathan Schorr
Maria Kleback
Alex Xu
Vanessa Raymond
Neill Warrington
Sara Fuentes
Tom Zito
William R. Hearst
james byrne
James Griffiths
Tyler Calvin
Charlotte Yvonne Reid
Emily Porter
Aubrey
Joseph Caprara
Charlotte Yvonne Reid
Tracy Freeman
Alison Fraser
Amira Haddon
Benevity Community
Impact Fund
Blackbaud Giving Fund
Camp Rose Cellars LLC
Campari America
Cedric Sanders
Chynna Spencer
Cristobal Morales
Edward Milstein
F N Cellars LLC
Federico Seisas
Femi Oyediran
Fidelity Charitable
Gray Hu
Gusmer Enterprises
Hampton Water
Hector Cordova
Jaedra James
James Smith
Jennifer Harton
Jon Howard
Jung Chen
Katrina Valenti
Kermit Lynch
Lodi Appellation Inclusion
Collective
Maddy Van Elzen
Mario Calderon
Nakedwines.com, Inc
Napa Valley Vintners
Oliver Wine Company
Pax Wines
Sam Nellis
Schwab Charitable
Scottian Corbin
Southern Smoke
Foundation
Steve Ellis
Tom Lindstedt
Torrence O'haire
Will Farmer
Winderlea

Other notable financial support came from the following partners in 2021.

GRAND CRU UNDER 200K

Hampton Water \$104k

PREMIER CRU UNDER 100K

Southern Smoke Foundation \$80k

Nakedwines.com \$65k

Kermit Lynch \$25k



KERMIT LYNCH
WINE MERCHANT



LOOKING TO THE FUTURE

We are so thankful for those who support us and follow along on our journey to provide communities of color opportunities for career and education in all aspects of wine. As we look to 2022, we have a number of exciting projects and goals in mind. Here's what to expect in the coming year:

Build Fermenting the Future, a program set to launch in spring in NYC. This program explores the pipeline of high school to wine business or wine business college programs.

Expand our enrichment trip: We love taking scholars on trips outside of the country, and in order to expand this program we are focusing on modifying the passport process, TSA precheck, real ID, etc.

Expand our HBCU scholarship through partnerships with Thurgood Marshall, and others. In general, this will include modifying the scholarship process, and defining the program expectations.

Open staff positions in 2022: Educational director, career coordinator, mentorship coordinator. We need more people to create valuable support.

There are so many ways to join us in our work of access and inclusivity. Contribute to The Roots Fund mission by way of wine education, mentorship, and/or job placement.

- Become an Intern
- Post a Job / Internship
- Work for TRF
- Volunteer
- Become a mentor

