

2022 Annual Report



EDA Economic
Democracy
Advocates

638 Spartanburg Hwy, Ste. 70-342,
Hendersonville, NC 28792 USA

sustaineda.org



My introduction to you

Carl Patten II, Managing Director

I am pleased to start our journey together as Managing Director of EDA. I am excited to step into the legacy of James Quilligan to encourage us over the next few years.

2022 served as a banner year for EDA, with James as our leader. We were able to initiate a research study with Protect our Aquifer (POA). You can see some highlights of the study in this report. The POA study is meaningful because I was born in Memphis, TN. While I currently reside in Atlanta, the impact of our work has direct implications for the space that I still consider home.

Economic inequity abounds in our society. Atlanta was recently named the city in America with the most income inequity. Ecological concerns have traditionally aligned with social and economic status. Our work remains vital because economy and ecology are symbiotic barriers for numerous communities.

Here are a few items I hope that we will be able to discuss in next year's annual report:

- * Three-year strategic plan
- * Initiatives for membership growth
- * Renewed interest in Shelby County, TN, via a second POA study
- * 2023 Annual Conference
- * An initiative to provide innovative solutions for the Colorado River pact
- * Inroads to legislative activities with Texas
- * Introduction to new foundation partners who provide fiscal support

**As we celebrate 2022,
I'm excited to think about
our future together.**



So far, so good!

David Cunningham, EDA President

The State Legislation Team has established four stages for our review of bills, based on when states hold their legislative sessions. This will enable the group to be much more efficient in identifying bills for food, water, and energy, and contacting local legislators.

The Advocacy Team has been working on training our local partners in advocacy work. Earlier we had an opportunity to meet with interest groups in Oakland, California and Asheville, North Carolina, which helped us establish a model for future training opportunities. A video training series is now in the works.

A very productive and exciting year!

Economic Democracy Advocates has advanced in many ways.

The Education Team has made significant progress in informing the public. We created a series of Friday seminars that were presented throughout 2021 and these events will resume in 2023. We have also made a foray into social media to educate people, and this will continue.

The Research Team developed a major report for Protect Our Aquifer in Shelby County, Tennessee, which we submitted to them on November 1, 2022. The study was extensive, covering many aspects of the carrying capacity of underground water in the Memphis Sand Aquifer, its non-consumptive use by agriculture and industry, a breakdown of various segments of the county's population, as well as its culture and history.

Generally speaking, EDA needs more members to complete the work we have planned for communication, marketing and social media. Besides our work in Tennessee, we intend to expand our partner base into the states of the Colorado River Basin next year, and possibly Texas as well.



Another area that we are improving is fundraising. We can't continue to rely on the donations of EDA members to support us. We need to diversify our sources of income. In 2022, we began raising funds from outside of the organization. This has opened up new horizons for us.

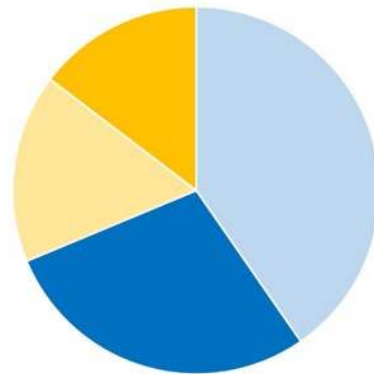
In late 2022, Managing Director James Quilligan decided to leave his position to become the Director of Development and devote his time to fundraising. Subsequently, EDA hired Carl Patten II as our new Managing Director. Carl is a very bright and talented manager who we know will lead EDA into a successful phase of expansion.

I believe that EDA is primed for growth. We have put considerable efforts into simplifying our story. We are modifying our message from carrying capacity and resource democracy to solving the practical problems on Earth. As we do this, I'm sure that EDA will grow because we will attract new people to our cause.

Focusing on fundraising and growth

Looking ahead, we need to develop more inclusion and diversity in our organization, and we are taking steps in this direction. We also need more youth in EDA. Some of our members are retired or on the back end of their professions (older than fifty). We need to attract younger people and accommodate them in starting or switching jobs as they move forward in their careers.

2022 Donations by Source



- EDA - Single
- EDA - Sustaining
- EDAF - Single
- EDA F - Sustaining

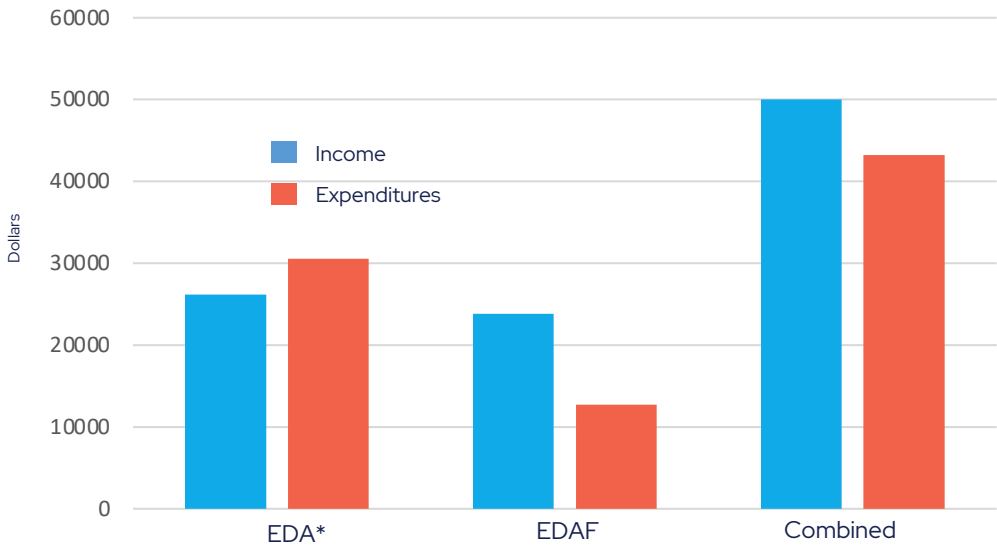


With EDA, I've taken a very different approach than I would have earlier in my career as a manager. I think I've now become more of a "servant leader," listening to people's creative ideas. This takes real patience and foresight. I must say that EDA is the most creative and intelligent organization I've ever been part of, even more than Proctor and Gamble and General Electric, the corporations in which I spent many decades working.

I began my presidency in August 2021. As I continue my time in office, I will keep learning as much as I can while looking for suggestions from the Governing Circle. I am grateful for the opportunity to serve EDA. Working here has been a Godsend, knowing that what I do will benefit those who follow me.

As a father and grandfather, I understand the importance of passing on advice and teaching to those who will further it in ways that I can't even imagine. Isn't that what it's all about — spending our lives with the people and things that will live on after us?

2022 Revenue & Expenditures



*Note: 2021 surplus funds were used to cover 2022 deficit



The promise of EDA

James Quilligan, Managing Director 2018 - 2023

During the next few years, EDA will be moving from a volunteer organization to a business operation with paid staff. Moving into this new culture will change the dynamics of EDA. To maintain our vision and values, it's important to remember why EDA is structured as it is. This section of our Annual Report is intended as a refresher course for our present members and a handbook for our successors.

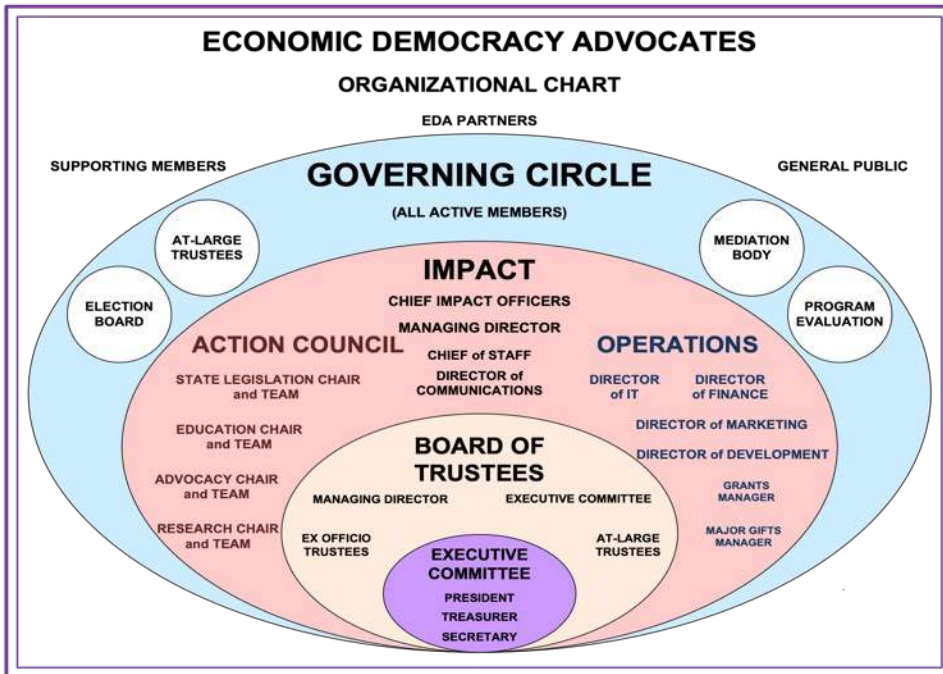
EDA/EDAF have been codified as 501(c)3 and 501(c)4 non-profit corporations in the State of California. From the beginning, we wanted to be more effective, accountable and empowering to members than other nonprofits. To supplement our bylaws with the aim of making our organization more member-directed, the EDA Cooperative Charter was drafted between August 2017 and June 2018 with input from sixty-five people.

Our Charter drafting team spent considerable time and effort in designing a governing structure that fosters the direct engagement of members with EDA.

As the Charter's preface states, "We recognize that social enterprises can become top-heavy for the sake of efficiency, or bottom-heavy in the interest of fairness. To develop a working balance between our leadership and members, we think this must include top-down and bottom-up checks and balances, with built-in incentives for both".

We understood that the way to realize this unity is to create a balance between the individual and collective rights and responsibilities of our members, staff and administrators. Through the drafting of a founding document and its subsequent ratification at the Convention for a New Social Contract in Philadelphia in 2018, we gave our fullest attention to developing this equilibrium.

The details are explained in our Charter but are simply illustrated in EDA's organizational chart.



1 Governing Circle

The Governing Circle (blue oval) is comprised of Active Members who have paid their annual fees and have voted in our elections and ratifications; and Supporting Members who have paid their fees but have not voted in two consecutive elections.

The Election Board, Mediation Body and Program Evaluation (white circles) are committees appointed by the Board of Trustees to guide and assist the self-directed interests of members, including their rights, skill development, creative expression and opportunities for service in EDA. The At-Large Trustees are elected by the members to represent them. These four groups have independence in connecting the voices of our members directly with the Board of Trustees. They perform their work with the knowledge that the administration of EDA will not supervise or interfere with their activities, unless they go off-mission or breach EDA's legal statutes.



a) Mediation Body

The Mediation Body represents the individual rights of members of the Governing Circle which may be unrepresented or overlooked in the collective policies, procedures or management of the organization. When called upon, the Mediation Body will engage in conflict resolution and restorative justice on behalf of members who file grievances against other members or against EDA.

b) At-Large Trustees

The At-Large Trustees are the co-stewards of all members, engaging them to take on a number of diverse roles based on their interests, skills and the organizational needs and opportunities within EDA. *(More on At-Large Trustees in 3 b on page 10)*

c) Election Board

By creating free and fair elections, the Election Board ensures the individual rights of EDA members to run for office, vote for candidates and ratify policies and appointments. EDA's elections require a quorum of 60% of the Governing Circle to vote, and through this voting, 50% + 1 of our members decide each election or ratification.

d) Program Evaluation

Program Evaluation measures the effectiveness of our programs and operations. EDA will begin the process of evaluating program outcomes as our business activities and budgets scale up significantly.



2 IMPACT Working Group

The Integrative Management Planning and Coordinating Team (pink oval) was approved by the EDA Board of Trustees and ratified by the Governing Circle on [November 1, 2020](#). The IMPACT Working Group bridges our Chief IMPACT Officers, Managing Director's Office, Action Council and Operations, enabling collective planning and coordination among all of EDA teams and departments.

a) Chief IMPACT Officers (CIO's)

The Chief IMPACT Officers include the Directors of EDA's Information Technology, Finance, Marketing and Development departments, as well as the Managing Director. They lead the IMPACT Working Group and make strategic decisions for EDA's business planning. The CIO's have not yet been formally appointed.

b) Managing Director.

The Managing Director oversees the programs and business of the organization through the Action Council and Operations Department. Within the Managing Director's office, the Chief of Staff is empowered to develop internal communications with all members and departments for administrative objectives. The Director of Communications is entrusted with both internal and external communications to develop marketing and public relations efforts.

c) Action Council

The Action Council develops and runs EDA's projects for state legislation, research, education and advocacy. The Action Council is the program side of EDA.

d) Operations

Operations is focused on the tasks of Information Technology, Finance, Marketing and Development that are necessary to support the programs of the Action Council. The Operations Department represents the business and technical side of EDA.



3 Board of Trustees

The Board of Trustees (tan oval) supervise the legal and membership aspects of the organization, including non-profit responsibilities, policies, memberships, elections and ratifications. The Board is a union of two different groups: the Executive Committee, which oversees the legal, financial and administrative functions of EDA; and the At-Large Trustees, who generate member engagement within EDA. Each of these teams have three seats on the Board.

a) Executive Committee

The role of the Executive Committee (purple oval) is to fulfill its corporate duty of care by examining staff policy, monitoring the activities of the organization, reviewing financial statements and budgets, monitoring compliance with non-profit law, and intervening in decisions that may be contrary to the mission of the organization or harmful to the organization's tax-exempt status.

b) At-Large Trustees

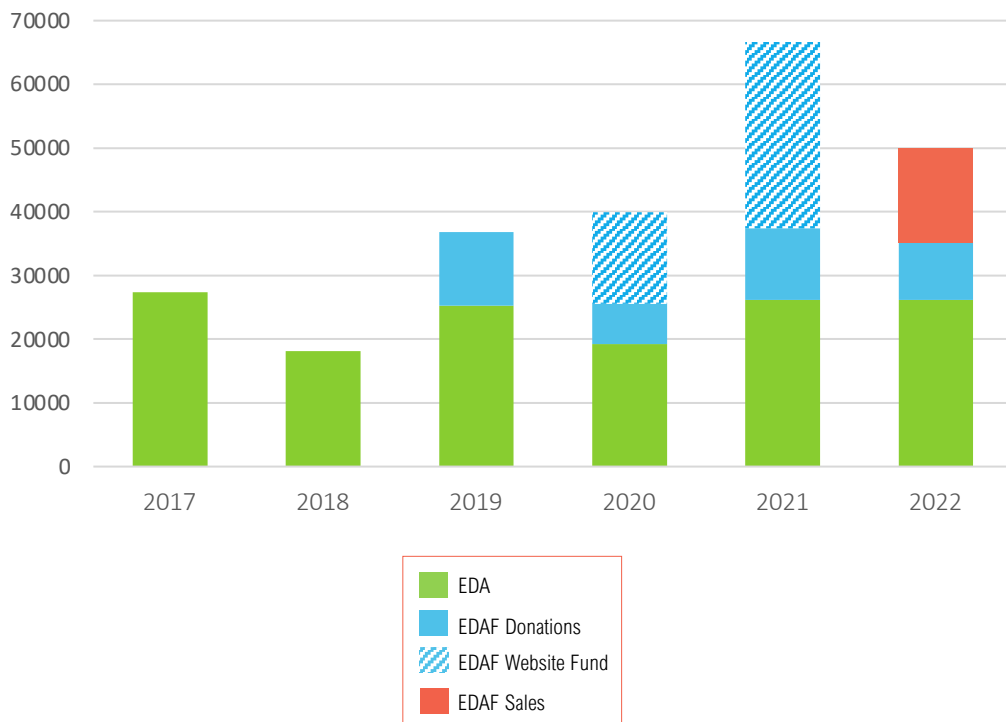
The At-Large Trustees were created to be liaisons with EDA members as a self-directed group, bringing their interests directly to the Board. While holding seats on the Board and reporting to the Executive Committee, the At-Large Trustees serve as 'shopfloor stewards' who work alongside members to assist them in furthering their individual rights and organizational interests, skills, knowledge, placement opportunities and decisions within EDA.



Bringing our cooperative spirit into the world

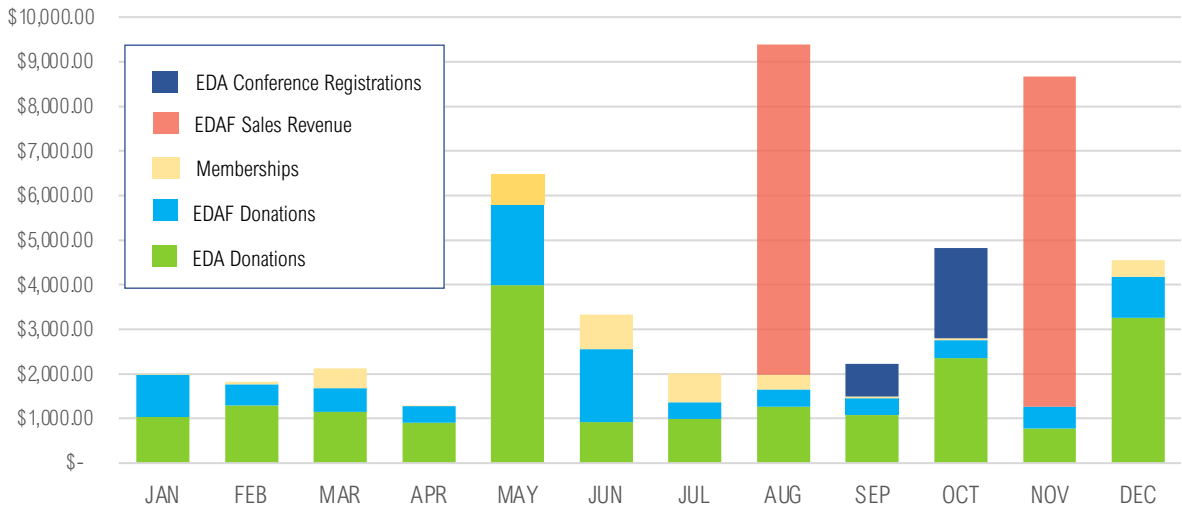
These are all examples of how we use systemic checks and balances to realize the goals for the member-directed organization that we set forth in 2017. As that document concluded: “The Cooperative Charter of Economic Democracy Advocates is our foundation for agreement, based in free, equal and cooperative human relationships and balanced between personal and collective needs. Through this practice of organizational equilibrium, EDA hopes to bring our cooperative spirit into the world.”

Annual Revenues





2022 Revenues by Month



After six years of development, we are proud of what we have accomplished. Few organizations offer their members and staff the power to influence the departments and programs in which they work, the conditions of their workplace, and the management and direction of their organization. This is the collaborative balance we have struck. It requires every department, carefully following its own mission while working together with the others, to keep the organization operating in unity.

**We're off to a fine start.
Now let's keep it all
rolling and evolving!**



EDA Financial Documents

Independent of EDA's Budget Committee and Board of Trustees, EDA members Dorothy Myers and John Lowe completed an internal audit of EDA and EDAF finances for 2022. This audit was certified by EDA Treasurer Greg Pace on March 7, 2023.

You can view the 2022 Audit Reports here.

EDA Financials

[2022](#), [2021](#), [2020](#),
[2019](#), [2018](#), [2017](#)

[2022 Audit Reports](#)

IRS Documents

EDA

Form 990-N

[2022](#)

[2021](#)

[2020](#)

[2019](#)

[2018](#)

[IRS Determination Letter](#)

EDAF Financials

[2022](#), [2021](#),
[2020](#), [2019](#)

EDAF

Form 990-N

[2022](#)

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* Legislative action for food, water and energy