RESOURCE GENERATION 2023 ANNUAL REPORT

LETTER FROM THE EXECUTIVE DIRECTOR

The story of 2023 can be told in the story of the last three months of the year. We entered October full-steam ahead by preparing for our first in-person Making Money Make Change since 2019.

We were navigating the disillusionment of the national political moment. As a result of the pandemic, our membership lost rhythm in turning out for in-person events and was increasingly made of people who had primarily or exclusively organized virtually. We heard similar experiences from other movement organizations that described 2023 as starting with donor and volunteer "fatigue."

Meanwhile, our partners were sending us a clear message that our movements need a Resource Generation that is bigger and more powerful. While I am so proud to be an organization of over 1,100 dues-paying members moving \$120 million a year to movements, we began envisioning what would become possible with an RG of 10,000 members moving over \$1 Billion a year to movements. Toward that end, we prepared to launch a national housing campaign to bring people in meaningfully and clearly and harness our power toward changing the systemic conditions of our country. Then, the tragedy of October 7th and the subsequent siege of Gaza happened. We became an initiating organization in the <u>Funders4Ceasefire</u>, and our community moved quickly to provide sustained action and resource mobilization for organizations and people in Palestine (largely, through our partners at <u>Grassroots International</u>) and domestically. <u>I was proud to be alongside over 60 other Executive Directors last December, taking direct action in our nation's Capitol.</u>

While turning out for ceasefire actions, we continued to organize our base by moving forward with Making Money Making Change (MMMC) and preparing for our national housing campaign. MMMC was a huge success, not in the number of participants, but in every other metric. Our staff, who largely had never been to an in-person MMMC, experienced the transformative nature of the conference firsthand. Member-attendees left with a deeper sense of connection to the RG community and with bolder commitments to redistribution and organizing. And our partnerships were deepened with presenters and financial professionals.

LETTER FROM THE EXECUTIVE DIRECTOR (CONT.)

As we closed the year out, we were forecasting a Spring 2024 launch of our Housing Justice for All campaign; we celebrated exceeding our Redistribution Pledge goal by over \$20 million; and we started to develop clarity that 2024 would be the year that RG focuses on sustainable growth. Our movements must grow to have the political power necessary to win our demands. While so much is broken in this world that needs healing, the stakes are clearer than ever. And in these times of protest and renewed energy, RG is continuing our mission of helping develop and organize the next generation of leaders.

In Solidarity and with Gratitude,

Yahya Alazrak Executive Director



GET INVOLVED

Become a member of RG

Renew Your Membership

Membership dues are part of our practice of accountability to social justice movements and commitment to deepening and expanding RG's community and work. When we pay membership dues, we not only enable RG to keep running, but we also strengthen our alignment with social justice movements through participation in coalition building, campaigns, developing leaders, and more. Our ask to you is to fund and participate in this organization like you want our movement to win! Join us by committing to move 10% of your overall redistribution to your RG membership dues.



Sign RG'S Redistribution Pledge

Resource Generation is working toward a vision in which wealth, land, and power are equitably shared. Achieving this vision requires more than just individual action—it requires systemic, cultural, policy, and institutional shifts, reparations, and a radical reimagining of society. We believe that well-resourced grassroots social movements led by Black, Indigenous, and People of Color, poor and workingclass communities, women, and queer and trans people are our best hope for achieving this vision. This is why we ask our members to commit to boldly sustaining social justice movements that are working toward systemic shifts through personal redistribution commitments in alignment with RG's <u>Redistribution Guidelines</u>. Take bold action toward your redistribution, and sign RG's 2024 Redistribution Pledge today!



Sign Up For Updates & Get Involved Locally



FGFLGFTS FROM RESOURCE GENERATION N 2023

WE MOBILIZED PEOPLE...

We ended the year with

1010 dues-paying members

This included

166 new members

And a

82% renewal rate

12 college campuses

6 new Student Fellows

73 dues-paying college members

WE MOBILIZED PEOPLE...

In 2023, 530 RGers pledged to

REDISTRIBUTE

TO SOCIAL JUSTICE MOVEMENTS

FUNDRAISE

FROM THEIRIN ALNETWORKS (OR VIA AWITHFAMILYTRANFOUNDATION)INVES

INVEST

IN ALIGNMENT WITH OUR TRANSFORMATIVE INVESTMENT PRINCIPLES

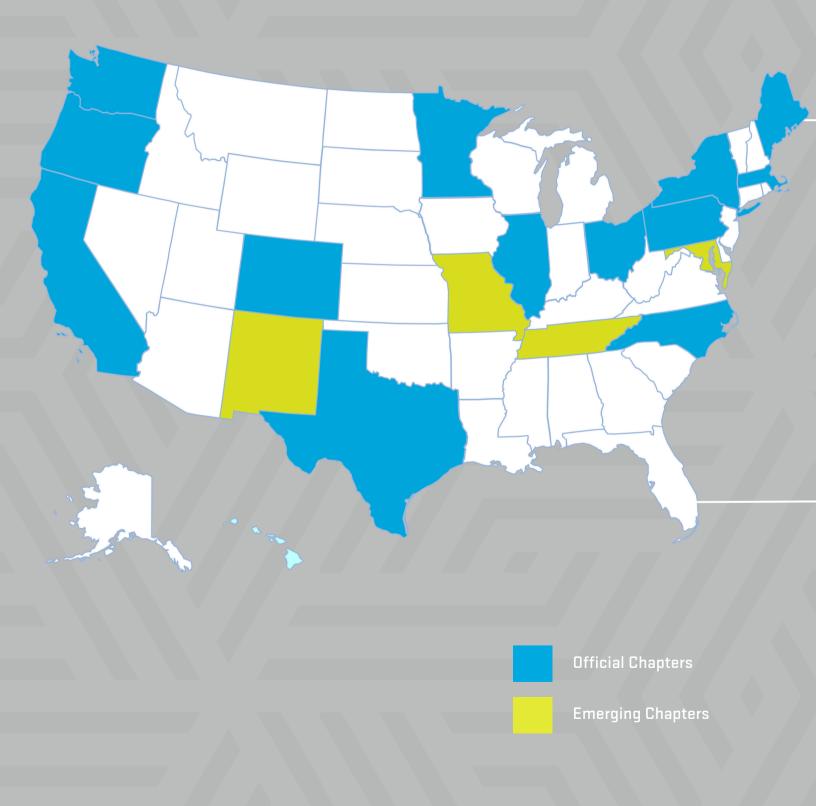
GIVE

\$4M

TO RG'S CAMPAIGN PARTNERS, MOVEMENT FOR BLACK LIVES AND THE CENTER FOR POPULAR DEMOCRACY

genesource

WE GREW....



19 official chapters

Official Chapters In:

Asheville | DC | New York City | Philadelphia | Chicago | Colorado | Michigan | Minnesota | Ohio | Boston | Connecticut | Maine | Vermont | Western MA | Austin | North Carolina Triangle | Bay Area | Los Angeles | Portland | Seattle

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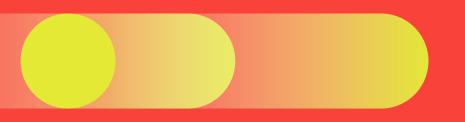
emerging chapters

Emerging Chapters In:

Baltimore | Pittsburgh | St. Louis Nashville | New Mexico

MEMBER TESTIMONIAL

"I've had questions about why I should pay membership dues to an organization that is in large part made up of wealthy people; especially wondering shouldn't that money be redistributed straight back to the communities from which it was once stolen? (Yes, most of it should!) Also, there's this; if RG can be member-funded, then it doesn't need to try to outcompete other social justice organizations that also need that funding, so that we can work alongside, instead of in competition with these orgs. Membership dues mean paying our cross-class staff a livable wage and making it possible for the organizing of young wealthy people to continue. Being a dues-paying member is what enables RG to exist in a more valuesaligned way, and I'm grateful to all those who were dues-paying members when I discovered RG because, without the support and education that I've benefited from these last few years, I'm certain I would be redistributing far less of my inherited wealth." - Adaline H, VT



WE LEVERAGED POWER THROUGH ORGANIZING...



Chapter Organizing

Three years into the pandemic, with caution and care, in-person RG chapter organizing resumed across official and emergent chapters. Staff Organizers resumed visiting and meeting with chapters, in some cases for the first time this decade. Eleven official chapters held retreats at the top of the year to build collective understanding and set goals, norms, and vision for the year. Our Regional Organizing Team experimented with peer learning spaces in the form of Member Leader Labs and introduced collective leadership development training for Member Leaders through new Member Leader Orientations. During the summer, staff committed to deepening our understanding of organizing in alignment with our values and mission by participating in the six-week We're A Nerdy Movement Study Group. We continue to develop norms and practices that work to improve mutual clarity, expectations, and norms between our volunteer Member Leaders and staff toward an agile, leaderful base that is working locally as well as more broadly across the settler colonial United States to achieve our mission of the equitable redistribution of land, wealth, and power in our lifetime.

College Organizing

For the first time, our Student Organizing Fellowship welcomed a cross-class cohort of college students and recent graduates. In its third year of existence, the program grew to six Fellows from Washington, Minnesota, Michigan, Ohio, Pennsylvania, and New York. The Fellows spent the year working on special projects to support national organizing:

- Interviewed RG members and alumni to compile a vault of storytelling and organizing advice,
- Created an RG TikTok,
- Revised the curriculum for college praxis,
- Increased the resources available to support BIPOC constituents in their wealth redistribution journeys,
- Supported the inaugural Organizing Summit,
- Took on leadership roles at Making Money Make Change, and
- Created a zine to guide on-campus cross-class organizing and connect college students to active chapters across the country.

WE DEVELOPED LEADERSHIP & SKILLS....

2K WEBINAR REGISTRANTS FOR VIRTUAL TRANSFORMING PHILANTHROPY AND INTERNATIONALISM SUMMER SCHOOL

RG's Transforming Philanthropy virtual series had over 300 registrants from across RG's membership and the philanthropic and social justice spaces, 60-80+ participants at each of the four sessions, and over 11 movement and social justice philanthropy organizations represented on our panels.

One participant shared, "I loved the 'Transforming Philanthropy 2023' virtual series. You guys rocked it! Great talks, tons of insights, and so much learning packed into one series - hats off to you! The diverse viewpoints brought to the table were refreshing. Major props to your team and all the brilliant panelists...Keep up the amazing work, and here's to more transformative conversations!"

RG's inaugural Internationalism Summer School had over 100 registrants and six powerful sessions with movement leaders and a cross-class audience. We were honored to host organizations including Hawai'i People's Fund, US Campaign for Palestinian Rights, Dissenters, Thousand Currents, Black Alliance for Peace, and several more. The speakers beautifully called RG and our members into action, especially those with access to wealth and class privilege.

One of our speakers shared, "Shift your practices! Move more and better money!! This is a crisis moment to be moving money. ADD ZEROS! Be BOLD and COURAGEOUS! Tackle your endowments! Where is your money invested?"

FIRST IN-PERSON MAKING MONEY MAKE CHANGE SINCE 2019

Participants pledged an additional \$2 million to movements in 2023 and tens of millions over the coming years.

We raised ~\$100,000 for our partner Grassroots International's Palestine Solidarity fund.

We deepened the leadership of existing members who excelled as pod leaders, panelists, workshop presenters, and No Talent Show hosts.

We built alignment on our national base-building and leadership development strategies toward winning campaigns, resource mobilization, and cultural change.

We strengthened our relationships with movement partners through workshop presentations, plenaries, panels, and the Activist & Consulting Cafe, where participants met one-on-one with major movement leaders.



WE HAD TWO MEMBERSHIP DRIVES...

\$1,048,683 AND 29 NEW MEMBERS

\$560,000 AND 26 NEW MEMBERS

Learnings from our Drives:

- The way that members resource RG is a microcosm of the movement. **The more RG succeeds in** getting members to move membership and all money earlier, the more movements benefit.
- When membership and redistribution pledge asks are leveraged as a base-building tool they can bolster chapter capacity and support chapters in achieving local partner fundraising goals.
- Local resource mobilization partnerships are powerful and move hundreds of thousands of dollars, if not millions, to local campaign partners! The RG infrastructure supports this and RG leaders are not only funding crucial movement work, but also acting as transformational co-conspirators in that work. To that end, resource mobilization partnerships are also a powerful base-building asset!

WE SHIFTED THE NARRATIVE...

NONPROFIT QUARTERLY

What Is Social Justice Philanthropy? A Donor Network Asks Hard Questions



ORGANIZE THE RICH

Share

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Organize the Rich

"People with access to wealth have much more to offer than just moving money" Interview with Yahya Alazrak, Part 1

MICHAEL GAST JAN 17, 2024

♥ 10 D 5



DEATH, SEX, & MONEY



December 20, 2023 · Episode 427 · 45 min

Your Inheritance Stories: When Death, Family and Money Mix

Death, Sex & Money >

Play

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WE INVESTED IN ORGANIZATIONAL SUSTAINABILITY & TRANSFORMATION...

RG has continued to prioritize the mental and physical health of its staff by implementing policies that promote a healthy and equitable workplace. Two new policies introduced by RG in 2023 are the Extended Medical Leave Policy and the Sunset Policy. The Extended Medical Leave Policy ensures that workers and their families have access to essential care and financial stability throughout their lifetimes. This policy is crucial for workers who need to take time off to care for themselves or their loved ones. The Sunset Policy offers a consistent exit package to support RG employees leaving the organization. By providing equity, transparency, and fairness, this policy can help alleviate anxiety and fear for those transitioning to a new job. It also makes it easier for RG to replace employees and ensures a smoother transition.

We did staff political education on the following topics: the history of membership-based organizations, the history of labor movements, and the Solidarity Economy and RG's Transformative Investment Principles

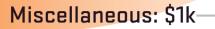
We said goodbye to some beloved staff:

- Ekundayo Igeleke, RG's Multi-Racial Base-Building Manager, focused on building strategy for BIPOC leadership development and base-building. His political clarity, commitment to joy, art, humor, and impeccable fashion will be sorely missed on our team.
- Jes Kelly, RG's Program Director, developed so many of RG's political education tools. She developed the current version of RG's praxis guide, stewarded and honed our Making Money Make Change conference, and shaped our organizational voice through her numerous blog posts, emails, and webinars.

We continued to invest in and work closely with our National Member Council, including representation from our Large, Medium, Small, Emerging & At-Large chapters

Members, staff, & board engaged in important conflict transformation work at national and local levels, and practiced living more deeply into our values around anti-classism, anti-racism, and transformative justice.

BUDGET SUMMARY



- Sponsorships: \$7k-MMMC
- Foundations: \$300k-
- Earned Income: \$160K MMMC and National High-Net Wealth Praxis
- Investments:\$31k Return on Investments

FY23 INCOME

Memberships: \$3.3M Membership Dues!

Sponsorship & Partnerships: \$20K Chapter sponsorship and partnership funding

Admin: \$195K Rent, insurance, and Meeting costs

Professional Fees:\$40K Outside facilitators and contract support

FY23 EXPENSES

Travel & Meetings: \$146K

All-staff and team retreats and professional development

Miscellaneous: \$3k

Interviewee and presenter stipends

Salary &

Expenses: \$2.8M

Living wage, benefits, and professional development for our staff team

GET INVOLVED TODAY https://resourcegeneration.org/join-rg/