EarthShare TEXAS

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(512) 472-5518 earthshare-texas.org

2022 Application for Participation

Our Mission

Through collaborative fundraising and partnership building, EarthShare Texas empowers mission-driven members to pursue positive environmental and health impacts across the Lone Star State for the benefit of all.

ESTX offers a long-term fundraising program built in ***collaboration*** with our member organizations through effective outreach to their volunteers, boards of directors and public supporters.

ESTX is ***committed*** to recruiting new organizations that assist in building our statewide workplace fundraising organization for environmental and conservation charities. Our membership is geographically diverse and includes organizations that cover the many facets of environmental and conservation missions.

Establishing new payroll contribution and cause marketing campaigns is critical to the continued growth of EarthShare Texas, we seek applicant organizations that are able and willing to make ***connections*** with decision-makers at new campaign sites.

5 Application Steps

Application Form
- **Submit your application electronically by 5:00 p.m. on August 31, 2022.**

Receipt and Forwarding
- **Upon receiving your application, ESTX will forward it to the Participating Organization Committee.**

Review
- **The Committee will review the application. During this process they may request a telephone interview with the applicant for further questions.**

Vote
- **The Committee will make a recommendation to the Membership Council, which will then vote on the recommendation. You will be notified of conditional Council action after a meeting scheduled for January 2023.**

Payment of Fees
- **Payment of entry fees or committing to a payment plan for entry fees is the final step in becoming a new participant.**

Criteria for Evaluation of ESTX Application for Participation

1. The organization's mission is clearly consistent with ESTX's mission.
2. The organization has a distinctive mission and program of work and will be able to market itself effectively within ESTX.
3. The organization adds value to ESTX and pledges to work cooperatively with ESTX in terms of its name recognition, base of support, establishing connections with corporate contacts, and willingness to collaborate with other ESTX participating organizations.
4. The applicant organization is vertically committed to the application for participation. Board, staff, and volunteers of the applicant organization are aware of the requirements and are committed to fulfilling them.
5. The applicant organization has the funds required to pay the full entry fee of $5,000 upon acceptance, or commits to one of the following payment options:
    - The organization can choose to pay half of the entry fee upon acceptance, due by April 1, 2023, with the remainder, including surcharges, as described in the accompanying spreadsheet, payable by April 1, 2024.
    - The organization can choose to stretch payments over three years and pay surcharges as outlined in the accompanying spreadsheet, with final payments due by April 1, 2023, 2024, and 2025.
    - The organization can choose to stretch payments over four years and pay surcharges as outlined in the accompanying spreadsheet, with final payment due by April 1, 2023, 2024, 2025, and 2026.
6. Coalition Organizations - National or regional groups having more than one chapter or branch and/or organizations sharing a common name or parent must form a coalition in order to participate in EarthShare Texas. Please speak to an EarthShare Texas staff member for more information on membership for coalitions.

Qualifications for Participation – 2022

Any organization invited to participate in ESTX shall:

1. Submit an "Affiliation and Participation Contract."
2. Be a tax-exempt charitable organization under section 501(c)(3) of the Internal Revenue Code and submit a letter of determination of exemption from IRS by the application deadline. (Any lobbying conducted by the organization must fall under the IRS criteria for 501(c)(3) organizations.)
3. Be governed by a volunteer board of directors that meets at least twice yearly.
4. Not be a chapter, subsidiary or parent of any current ESTX affiliate, except as a member of a coalition. (If applicable, please contact the ESTX offices for further information on coalitions.)
5. Be dedicated to and have as a primary mission, as evidenced by its mission statement or statement of purpose and by its past accomplishments, protecting and enhancing the natural community in the state through one or more of the following: conservation activities, advocacy, research, education, or grassroots organizing.
6. Prohibit illegal acts.
7. Be capable of fulfilling and willing to fulfill all ESTX participation requirements (listed in the following section).
8. Demonstrate a history of programmatic and fiscal accountability and responsibility for a period of no less than two years prior to applying for ESTX affiliation. Fiscal accountability includes an administrative and fundraising percentage as calculated using the most recent IRS 990 of not greater than 25.00 percent (the explanation of "25.00 percent" can be found on page 5).
9. Operate all programs without discrimination regarding race, sex, sexual orientation, gender identity, creed, age, physical disability or nationality.
10. Be registered with the Texas Secretary of State.
11. **In addition to ESTX participation requirements, be willing and capable of fulfilling requirements that may be necessary to qualify for the Texas State Employee Charitable Campaign.** These requirements include, but are not necessarily limited to, office space dedicated to the organization and open to the public at least 20 hours per week, and a published telephone number dedicated to and answered in the name of the organization with voicemail or an answering machine that gives pertinent information when the office is closed. The organization will be required to prove that no state employee contributions are used for lobbying or litigation. In addition, a clear statement of direct or indirect health and human services is required. The applicant organization must be willing to work with ESTX staff to carefully craft a clear, concise and accurate statement about services.
12. Be willing and capable of cultivating existing business connections to result in new workplace giving or cause marketing campaigns.

Responsibilities of Participating Organizations – 2022

1. Read and respond to all communications and materials received from ESTX staff and directors.
2. Be willing to use Google Apps as a method for sharing information and resources.
3. Have a working e-mail address that is checked regularly.
4. Submit updated documents annually for participation renewal and additional required documents for public sector campaigns by the deadlines established by ESTX staff in conjunction with the Participating Organization Committee.
5. Provide support on behalf of ESTX by fulfilling the 35 points requirement annually. All activities in which the member organization engages and that pertain to ESTX will be counted towards the fulfillment of the points requirement (see page 8).
6. Enter points in a timely manner in the spreadsheet that will be provided to you.
7. Have a designated representative or alternate attend a mandatory annual Membership Council meeting (end of January) and a summer meeting. Missing two or more consecutive meetings could result in a financial penalty.
8. Provide assistance to ESTX staff to open new workplace giving campaigns and ensure a successful campaign season. Respond to ESTX staff and colleagues on special projects such as the H-E-B tear pad campaign or other cross-promotional activities that bolster fund-raising and visibility for ESTX and its participating organizations.
9. Provide assistance to ESTX staff and the Participating Organization Committee to recruit new participating organizations, especially those working in under-represented communities, or areas of the state where ESTX is underrepresented.
10. The Membership Council representative and/or alternate representative must participate in a new member orientation to learn about ESTX policies and procedures. Each time a new representative is chosen, that person must attend a new member orientation.
11. Pay annual dues as determined by the board. New groups pay only entry fees and do not pay dues for the year in which they join ESTX.
12. Place the ESTX logo on the organization's website, in its newsletter, on its letterhead; and commit to publication of articles and stories about ESTX in newsletters, social media or other publications.
13. Work to establish an ESTX workplace campaign among the organization's own paid employees, if any.
14. Provide a listing of the organization's volunteer opportunities to ESTX for promotion to corporate and individual partners on a monthly basis.
15. Commit to sending acknowledgement letters to campaign partner organizations' employees who wish to be recognized for their gifts, and thank you letters to designated contacts for our cause marketing campaigns.

2022 Application for Participation

PLEASE SUBMIT ONE COPY OF EACH OF THE FOLLOWING:

- Your mission statement or statement of purpose.
- One-page description of your program and accomplishments for the past twelve months.
- Description of your audience/constituency. Please include your social media reach (number of followers on any platforms you have accounts for) and annual number of members or donors. Please include reach number and "handles" for the following media:
    - Facebook
    - Twitter
    - Instagram
    - Newsletter
    - Total followers
    - Monthly website visitors
- A list of cities and/or regions served by your organization, and any regular volunteer opportunities offered.
- A completed Affiliation and Participation Contract signed by your organization's CEO/Executive Director. (Please note any future changes to the designated Membership Council Representative and/or Alternate Representative must be approved by your organization's CEO/Executive Director.)
- Letter on your organization's letterhead and signed by your CEO/Executive Director appointing EarthShare Texas as your sole fiscal agent for workplace solicitation and workplace fundraising.
- Non-discrimination statement concerning employment practices.
- Description of your organization's efforts to implement principles of diversity, equity and inclusion, both in your board and staff, and in your program work, if any.

PLEASE SUBMIT ONE COPY OF EACH OF THE FOLLOWING:

- IRS form 990 from the previous two years.

  Notes about the 990:
  - As required by many of our campaigns, you must use the 990 long form. If an organization has been using the FORM 990 EZ, the most recent 990 would need to be amended and filed on the 990 long form. The organization would commit to using the IRS 990 long form for future filing.
  - The most recent 990 must cover a period ending no earlier than June 30, 2020.
  - The 990s must be signed by an officer of your organization.
  - The most recent 990 must include Schedule A and Supplemental Statements, even if those pages of your 990 are blank.
  - You must submit a 990 even if your organization is too small to reach the IRS threshold.

- To qualify for state and federal campaigns, you must use the accrual method of accounting and your accounting must conform to generally accepted accounting practices.
- Your administrative percentage must be 25.00 or lower. If your administrative percentage is 25.01 percent or higher, (see below for calculation instructions) you will not qualify for the State of Texas Employee Charitable Campaign or many of the other public sector campaigns. Therefore, we will be unable to effectively fundraise on your behalf and your application will automatically be rejected by EarthShare Texas.

  The administrative percentage is calculated from your 990 as follows:

  Add the amount in Part IX (Statement of Functional Expenses), Line 25, Column C (Management and General Expenses) to the amount in Line 25, Column D (Fundraising Expenses), and divide the sum by Part VIII (Statement of Revenue), Line 12, Column A (Total Revenue). No other method may be used to calculate this percentage.

- For organizations with operating budgets of $250,000 or greater, two of your most recent audits using the accrual method of accounting are required.

OR

- For organizations with annual gross revenues under $250,000, two of your most recent CPA reviews are required. (The most recent audit or CPA review must cover the same period as your most recent 990. Revenue and expense figures must match the 990, or you must have those figures reconciled by your CPA – either in a separate letter or on Page 4 of the IRS form.)
- IRS letter of determination of 501(c)(3) status – pending is not acceptable. Your organization's name on the 501(c)(3) letter must match exactly the name on the Secretary of State letter or you must include your Assumed Name Certificate or DBA letter.
- Letter from the Secretary of the State of Texas authorizing you to do business in Texas. (Certificate of Incorporation).
- Most recent brochure and/or newsletter and most recent annual report (if your organization publishes an annual report).
- A list of connections your board, staff or volunteers have to public and private sector workplaces that would help ESTX establish new workplace giving campaigns or other fundraising partnerships, or promote ESTX in existing campaigns. A list of recent workplaces where ESTX has payroll contribution campaigns may be found on the EarthShare Texas web site – http://earthshare-texas.org/earthshare-work/current-campaigns.

The mission statement, description of program, participation contract, fiscal agent letter, your audit or CPA review and your most recent 990, must be submitted on an annual basis for participation renewal.

This application is due in the EarthShare Texas' office no later than 5:00 p.m. on August 31, 2022

Electronic Submission: You may submit this application electronically with an electronic signature to estx@earthshare-texas.org. If you submit the application electronically, after acceptance into EarthShare, you will need to send us a brief letter written by the Executive Director stating that he/she has read the application packet and agrees to the requirements within.

Please feel free to contact us with any questions: estx@earthshare-texas.org or 512-472-5518.

Entry Fee Payment Plan

Entry Fee Payment Plans - Admittance Date in January 2023

Pay in Full

Entry Fee	Full balance due by 4/1/2023	Total Paid
5,000.00	5,000.00	**5,000.00**

Extended Payment Plan -- stretch payments over two years — 50%, 50%

Entry Fee	First installment due by 4/1/2023	Second Installment due by 4/1/2024	5% surcharge due with pmt by 4/1/2024	Total Paid
5,000.00	2,500.00	2,500.00	125.00	**5,125.00**

Extended Payment Plan - stretch payments over three years — 30%, 30%, 40%

Entry Fee	First installment due by 4/1/2023	Second Installment due by 4/1/2024	5% surcharge due with pmt by 4/1/2024	Third installment due by 4/1/2025	7.5% surcharge due by 4/1/2025	Total Paid
5,000.00	1,500.00	1,500.00	75.00	2,000.00	150.00	**5,225.00**

Extended Payment Plan - stretch payments over four years — 30%, 30%, 20%, 20%

Entry Fee	First installment due by 4/1/2023	Second Installment due by 4/1/2024	5% surcharge due with pmt by 4/1/2024	Third installment due by 4/1/2025	7.5% surcharge due by 4/1/2025	Third installment due by 4/1/2026	10% surcharge due by 4/1/2026	Total Paid
5,000.00	1,500.00	1,500.00	75.00	1,000.00	75.00	1,000.00	100.00	**5,250.00**

Notes

1. New Organizations will also pay annual dues in the year following their acceptance in the amount of $400 for 202 and $400 - $1000 in 2024 and 2025.

2. ESTX fiscal year runs July 1 - June 30. Annual dues notices for FY2020 will go out in January 2020.

Volunteer Points

To keep administrative expenses as low as possible, and to involve participating organizations as much as possible in the mission of EarthShare Texas, organizations are required to volunteer for ESTX. The intent of this policy is to emphasize the three most important functions of the organization: access (corporate partnerships), workplace giving campaign work and outreach and promotion.

The guiding principle for volunteer work is that it should be directed toward the common good of EarthShare Texas. Almost any work that benefits the whole organization is eligible for consideration. Work that benefits only a single organization and no other parts of the EarthShare Texas organization is generally not eligible.

Participating organizations are required to earn 35 points per year.

Points Chart

	Points	Description
REQUIRED		
Member representative or alternate attends two annual meetings	2+	plus 1 per 30 miles travelled for 1 attendee
Completes annual renewal application and all required campaign applications	2	Bonus: 2 for super early; 1 for early
Implements and/or promotes employee-giving campaign	1	
Adds ESTX logo and link to member website	1	
Attends an orientation (new members representatives)	1	
Required Points Total (6 minimum)		
FUNDING OPPORTUNITIES		
Works with staff to arrange a corporate volunteer event	5+	variable depending on size of event
Provides contact information for an access target	1	
Speaks with an access target over the phone and provides a report to staff	1	
Arranges an access meeting with a decision-maker and staff	3	
Accompanies staff to a meeting with a decision-maker	2	
Brings in funding opportunity more than $5,000 in year 1	5	
Brings in funding opportunity more than $10,000 in year 1	10	
Brings in funding opportunity more than $20,000 in year 1	20	
Funding opportunity continues, for each subsequent year:	5	
RECRUITMENT OF NEW PARTICIPATING ORGANIZATION		
Recruits a prospect that submits an application	1	
Prospect's application is approved	5	
CAMPAIGN		
Staffs a booth	3+	Plus 1 for each hour over the first hour and 1 for every 30 miles travelled
Speaks at a campaign event	5+	plus 1 for every 30 miles travelled

NETWORKING		
Second person attends membership meetings and retreats	1	
Governing Board Director	2	2 per meeting plus
ESTX Board Committee Member	2	2 per meeting plus
Conducts committee and board work outside of meetings	1	1 or actual time (1 point per hour)
OUTREACH AND PROMOTION		
Displays ESTX logo in newsletter	1-5	per display; 5 max
Promotes ESTX via social media (not including H-E-B or Reliant)	1-12	1 per post; 12 max
Invites an ESTX representative to speak at an organizational board meeting	3	
Invites an ESTX representative to speak at a staff meeting	1	
Volunteers at a planned activity, in the office, or as needed	1	
Displays ESTX brochures at event	1-3	3 max
Staffs a booth at a non-campaign event	2+	plus 1 for every 30 miles travelled
Promotes other ESTX cause-marketing campaigns via email, e-newsletter, social media or website	1+	8 max
H-E-B AND RELIANT		
Check H-E-B stores for display of tear pads	1-5	5 max
Promotes the H-E-B campaign via email, e-newsletter, social media or website	1	8 max
Promotes the Reliant program via email, e-newsletter, social media or website	1	8 max
Writes a thank-you letter to H-E-B or Reliant leadership	1	6 max
MISCELLANEOUS		
Any activity not included in this list will be evaluated on an individual basis		
Provides meeting space for membership or networking events		
Organizes ESTX networking event (members and/or business)		
TOTAL (35 Point Minimum)		