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This document was created in April 1998 as part of the forward planning process for the development of Earth Share Australia.

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1. PRINCIPAL GOALS

Earth Share Australia's principal role is to contribute to the protection of the environment by increasing the resources available to environmental organisations.

The Earth Share Australia Trust Deed provides that the objects of Earth Share Australia include:

- Enhancing human health and welfare via environmental Programs
- Preventing pollution
- Protecting threatened resources, habitats and endangered species
- Stopping oil spills and other environmental calamities
- Conserving natural resources for future generations
- Reducing hazardous and household waste
- Protecting the environment in any other way not inconsistent with the above

The establishment of ESA fills a critical need within the Australian environment sector and its potential has been clearly demonstrated by the success of Earth Share in the U.S. While payroll deductions in the work-place generate \$US3.5 billion in donations to all U.S. charities and about \$US10 million annually to Earth Share U.S., in Australia payroll giving to charities is relatively unknown.

ESA will become the first co-ordinated national payroll program in Australia and will not have to compete to the same extent with larger, long established Programs such as United Way, which has occasionally prevented access to workplaces by Earth Share in the U.S. The fund-raising potential for environmental groups, via payroll deductions,



within Australia is, therefore, very large providing a culture of payroll deduction donating can be established.

If ESA were to raise the same amounts per capita as Earth Share U.S., it would raise nearly one million dollars annually. Given that existing long-established charities, such as United Way, do not operate on a national basis in Australia, ESA could raise significantly more than this figure over a medium-term target of ten years. Our target is \$5 million annually by 2003.

About eighty per cent of Australians respond to questions in opinion polls by indicating their support for environmental protection. They consistently rate the environment in the top three of all issues about which they are concerned.

The total membership of Australian environmental organisations is probably less than half a million people. On this basis more than five million working Australians are rarely, if ever, directly approached to financially support the environmental organisations and issues which they say they support.

In order to fulfill its objects and the potential for payroll deduction fund-raising in Australia, ESA will seek to meet the following principle goals:

- To establish a national payroll deduction program, involving Government, private industry, academic institutions and semi-Government institutions with the aim of doubling the 1998-9 income (in real terms) of each individual member organisation within five years from June 1998.
- To provide a mechanism for funding and, where appropriate, co-ordinating environment movement-wide programs such as training, co-operative information systems, and national co-ordinating bodies.
- To facilitate and/or develop other movement wide fund-raising initiatives such as affinity credit cards, merchandising programs and industry bodies, where agreed by member organisations.

2. ABOUT EARTH SHARE AUSTRALIA

Earth Share Australia was established in 1997, as a charitable trust, by its founding nine member environmental organisations.

It is based on its successful U. S. counterpart, also known as Earth Share, with the primary aim of developing nation wide payroll deduction based fund-raising Programs.

The impetus, if not imperative, for its establishment was the need to substantially increase the resources available to Australian environmental organisations, which are facing a proliferation of pressures and demands on their resources, while at the same time suffering downturns in Government funding and limitations on other traditional sources of income.

Development of Earth Share commenced in early 1996 and its first member organisations formally agreed to the establishment of the organisation during early 1997. Earth Share achieved a tax-deductible status in April 1998. It had its official launch in July 1998 and commenced program development in September 1998.

During 1997 the organisation finalised its Memorandum and Articles of Association and its Trust Deed, elected directors and had its first formal meeting in that October. The



Earth Share Australia Foundation is what is known as an ancillary fund, the primary purpose of which is to distribute funds raised to other tax deductible organisations which share similar aims.

The Development of Earth Share Australia would not have been possible without the generous support of its solicitors, Corrs Chambers Westgarth, of David Allsop, of the Poola and Sidney Myer Foundations and of Earth Share in the U. S. In addition the organisation would like to acknowledge the support given by its initial Directors.

Earth Share Australia April 1998.

3. STRATEGIC ACTIVITIES

3.1 PAYROLL PROGRAMME DEVELOPMENT

3.1.1 Goals

A nation-wide program: To develop a nation-wide program of payroll deduction Programs, such that in each state and territory there are functional payroll Programs within Government and in the private sector delivering income to Earth Share Australia prior to June 30 1999.

To develop Government support: for payroll deduction Programs with Government employees at a political level prior to December 1998, including, if appropriate, legislation to support such Programs

Cross-section of employers: Within the life of this plan, to develop a broad cross section of small and large institutions, within the private sector, academic institutions, Federal, State and local Government departments, semi-Government institutions and larger non-Government organisations such as trade unions, delivering payroll deductions to Earth Share Australia.

ESA should aim to have approached all State Governments, the Federal Government, each major capital city council, all universities, and a minimum of twenty other businesses prior to December 30, 1998.

National acceptance among employers: ESA should aim to achieve wide-spread national acceptance of the payroll Programs as an appropriate mechanism for employers to support charitable institutions within the life of this plan.

Promotion of Earth Share among employees nationally: In order to achieve its maximum potential Earth Share will vigorously promote payroll deduction Programs to employees nationally.

3.1.1 MECHANISMS

Formal approaches to Government: Within each state and territory member organisations will be asked to approach either the Premier and/or her/his department to seek formal support from Government, at the highest level for payroll Programs. This should be organised in conjunction with ESA staff and/or Directors. At the Federal level ESA staff and directors will make formal approaches to Government, if necessary in conjunction with a national member organisation.

Company payroll Programs: ESA staff and directors will draw up, with state based member organisations, a list of companies which will be approached by member organisations during the first three months of operation, from August 1998.



Member organisations will conduct promotional activities, where appropriate, to obtain the maximum participation rate among employees.

Government payroll Programs: Member organisations will seek meetings with State Public Service Associations/Unions to obtain union support for payroll Programs with their members.

Member organisations will commence approaching key Government departments in each state, territory and federally, one initial political support has been established.

Member organisations will conduct promotional activities, where appropriate, to obtain the maximum participation rate among employees.

Publicity Materials and Promotions: ESA will develop publicity and promotional and administrative materials including materials directed at:

- Employers
- Government
- The general public
- Environmental organisations
- The media
- Employees of companies, Government departments and other organisations.

Publicity materials will include:

- Community Service Advertisements for TV, radio and print media
- A kit aimed at companies but with applicability to both media and Government
- A leaflet/brochure aimed at employees in target employers
- Publicity materials aimed at increasing employee participation rate in payroll programs.

ESA will conduct an intensive promotional campaign with employers via media and direct approaches to senior management within target employers.

3.2 ORGANISATIONAL DEVELOPMENT (INCLUDING ESTABLISHMENT FUNDING)

3.2.1 GOALS

Office systems: To provide efficient and advanced administrative and organisational systems for a national payroll deduction program, using advanced technology, such that the total budget for ESA is ten per cent or less of total income, within three years after from the receipt of first income, allowing initial start-up costs to have been met by this time.

Headquarters: To develop an independent administrative centre for ESA, including full office facilities, not later than August 1998, in a location which minimises overheads costs.



Working Environment: To provide a high quality working environment and working conditions and job satisfaction for staff, including appropriate training.

Staffing: To employ sufficient staff during 1999 to perform essential functions including:

- Overall co-ordination
- Financial administration
- Promotion and publicity
- Liaison with Directors and member organisations
- Development of services to member organisations and, where appropriate, the broad environment movement

Membership: Once income permits to broaden the membership of Earth Share to ensure that the membership includes national, regional and specialist organisations from all states and territories and covering all key environmental issues.

Board of Directors: To increase the membership of the Board of Directors to fifteen and to ensure all Directors are active and well informed.

Member organisations: To provide appropriate and regular training for staff and volunteers of member organisations

3.2.2 MECHANISMS

Staffing: By the end of 1999 a minimum of five specialist full-time or part-time staff or consultants should be employed to deal with each of the key activities including:

- Overall organisational coordination/management
- Administration, office systems and secretarial work
- Communications, publicity and promotions (including internet publicity)
- Financial management, systems and administration
- Board and membership liaison, training and development
- Staff should be provided with appropriate training and support systems

Office Headquarters: ESA will open an office headquarters at a location which ensures low cost office rental and reasonable service and communications links. The facilities should provide sufficient flexibility to allow expansion of the organisation for at least three years. The office will provide a high quality working environment and working conditions.

Office systems: In establishing office systems key priorities will be:

- The use of cost effective and technologically advanced systems
- Effective and efficient management and distribution of information



- The ability to communicate efficiently, effectively and cheaply to all constituencies including staff, directors, member organisations, employers and the public
- Providing user-friendly and time-efficient equipment to staff
- Providing a healthy working environment for staff.

Membership and member organisations: The members of Earth Share will be kept regularly informed of all ESA activities and will be required to reciprocate with the information required by ESA for its effective operation.

Participation of ESA members is essential to allow ESA to function effectively and to keep administrative costs below the threshold established by ESA Directors. This will be a major emphasis of ESA in all aspects of its operations

During 1999 ESA will develop membership guidelines which are likely to ensure that the membership includes national, regional and specialist organisations from all states and territories and covering all key environmental issues.

ESA should aim for a maximum membership of between forty and fifty members.

Non-member organisations should be supported, where appropriate, via the grants program.

Members will be asked to focus their initial eighty hours of voluntary support for ESA on acquisition of potential employer participants and on securing political support at Government level.

Each member organisation will be asked to initially identify four key businesses, Government departments, universities or alternative institutions for 'acquisition' within three months of August 1998.

Training: Effective and regular support from member organisations will be critical to the success of ESA. In order to ensure that member organisations are capable of supporting ESA effectively through their compulsory contribution of eighty hours of unpaid labour, regular training for staff and committee members of each member organisation will be provided. As part of the commencement of operations ESA will provide appropriate training for staff and volunteers with member organisations in each capital city prior to August 30, 1998 with regular additional sessions for new staff and or organisations at regular intervals of not more than six months.

Where appropriate members will be asked to send staff and committee members to the Earth Share office in Northern NSW for induction and training. Training Programs will involve:

- Explanations of payroll deduction fund-raising
- Training in ESA internal systems
- Instruction on how to approach companies and government departments to establish payroll programs
- Promoting ESA in the media and with the public



- Promoting ESA and payroll programs with staff of supporting companies and Governments
- Instruction on ESA policies and programs.

Board of Directors: ESA will increase the membership of the Board of Directors to fifteen and to ensure an active and well informed Board of Directors using the following key criteria:

- Key criteria for Board members should be support for the general aims of ESA
- An understanding that the role of Directors is independent of member organisations and that Directors have specific obligations as Trustees of the Earth Share foundation
- An ability to contribute time or specialist knowledge such as contacts within Government, trade unions, business or other relevant organisations
- Financial or other key skills which will support management

3.3 NON-PAYROLL PROGRAMMES

3.3.1 GOALS

While non payroll fund-raising goals are a part of the long term strategy for Earth Share Australia, they will only be undertaken providing they do not conflict with the main goal of establishing extensive national payroll deduction fund-raising Programs. As a non partisan, non political organisation, no activity will be undertaken which is likely to adversely affect the perception of Earth Share Australia as a non-political organisation.

Additional fund-raising mechanisms: After the successful establishment of payroll Programs ESA will identify, with the approval of Directors and member organisations, other nationally based fund-raising Programs which have the potential to substantially increase income to member organisations and the broader environment movement

Services to the environment movement: Where appropriate, ESA will fund and/or provide environment movement-wide services areas in appropriate areas.

Co-ordination: As a national and broad based representative organisation, ESA will provide coordination for the environment where requested and appropriate

3.3.2 MECHANISMS

Additional fund-raising mechanisms: While the primary focus, especially initially, will remain on payroll Programs, the national nature of ESA, its broad membership and the small population base of Australia, makes it appropriate for ESA to develop and provide additional fund-raising Programs, which in countries with larger populations can be undertaken by individual environment groups. Among the Programs that may be considered are:

- Affinity credit cards
- A "Green Shield" Appeal (a national doorknock day on behalf of all environment groups, similar to the Salvation army Red Shield appeal and utilising the volunteer resources of all member groups)



- Agreements with service or other industries where those companies contribute a proportion of income to the environment movement (examples are the existing Conservation Alliance and Working Assets, in the US)
- Levies on outdoor usage with proceeds going to environment groups (sometimes known as "pass through" fees)
- A national merchandise marketing organisation
- Environmental levies on produce (e.g. the sales of environmental magazines)

Services to the environment movement: As a secondary priority after fund-raising Programs which provide funding directly to existing member groups, ESA will consider coordinating, funding or undertaking service provision to the environment movement. Among the service Programs which will be considered at an appropriate time are:

- The funding or provision of a national environment movement training program
- The co-ordination and funding of a national environment technology and information program.

Co-ordination: As an additional secondary objective ESA will undertake, if appropriate, the provision of some national co-ordination services. Among those that will be considered are:

- The co-ordination of international campaign strategies
- Co-ordination of strategic alliances
- Development of an innovations unit ("think tank") within the national environment movement
- Co-ordination of a genuine national "Peak" body for the environment movement