

## 2023 Chevron Houston Marathon Run for a Reason Program Overview

Established in 1972, the Houston Marathon Committee, Inc. (HMC) annually organizes the nation's premier winter marathon, half marathon and 5K. Over 250,000 participants, volunteers and spectators make Chevron Houston Marathon race day the largest single-day sporting event in Houston.



The Chevron Houston Marathon Run for a Reason Program (RFAR) connects the philanthropic community to passionate race participants willing to raise funds and awareness for meaningful causes. Participants may select an official RFAR charity from a variety of categories that serve constituents in the greater Houston area. Since the program's inception in 1995, more than \$32 million has been raised to benefit various charities.

In order to participate, a charitable organization must meet the standards listed below that have been established by the HMC. The application process for new and returning charities is annual.

### Organizations must:

- Be a tax-exempt charitable organization under section 501(c) 3 of the Internal Revenue Code
- Have been in operation a minimum of two years
- Maintain administrative expenses of no more than 25% of annual revenue
- Be governed by a voluntary Board of Directors that sets policies and oversees the activities of the organization
- Undergo a regular financial review by a CPA or accountant who can attest that financial statements are in accordance with generally accepted accounting principles and do not require modification
- Identify a paid staff member as the point of contact (Charity Administrator)
- Serve constituents and host events in the greater Houston area that will be directly impacted by funds raised through the RFAR program

The HMC will oversee the general administration of the RFAR program and will therefore review each application for adherence to these standards. The role of the HMC is to establish campaign policies, determine eligibility for applicants and monitor charity participation in the program. Organizations are selected by an appointed selection committee. The selection committee reserves the right to select charities it deems relevant to the program, limit the number of charities within a category and limit the overall number of organizations accepted in the program.

Organizations should appoint one individual (Charity Administrator) to be the point of contact for their RFAR campaign. This individual must be a paid staff member of the organization and will be responsible for recruiting runners, monitoring the progress of individual fundraisers, regularly communicating with the HMC, marketing race entries as well as additional participation that is critical to a successful campaign.

Applications must be submitted through the provided online link by **Friday, October 15, 2021 at 5:00 PM CST**. Incomplete and late applications will not be considered. Applications cannot be emailed or faxed. Hard copy applications will not be accepted. Information collected in this application is for the Houston Marathon Committee internal review and will not be shared. Charities will be notified of acceptance or denial on or before November 30, 2021.

## 2023 Run for a Reason Program Application

The following information will be required on the application via the link provided once registration is open:

- Charity Name (listed exactly how it should appear when publicly associated with the RFAR Program)
- Organization's mission statement
- Full Address, including city, state and zip code (no PO Boxes)
- Main Phone Number
- Website URL
- Executive Director Name and E-Mail Address
- Charity Administrator Name, E-Mail Address, Office Phone Number and Cell Phone Number
- Contact Name and Email for additional people to access haku portal and receive RFAR email communication
- Year the organization was founded
- Number of full-time staff members and number of part-time staff members
- Organization status as it relates to the RFAR Program – first time applicant, applied previously but not selected, etc.
- Financial Information (Per organization's two most recent filed Form 990)
  - Annual Budget \$: Total Revenue (Form 990 Part I Line 12)
  - Administrative costs \$: Management & General Expenses + Fundraising expenses (Form 990, Part IX, Line 25C + Line 25D)
  - Administrative cost %: Administrative Costs \$/Annual Budget \$
- Select one (1) category for your organization:
  - Advocacy
  - Animal Rights/Welfare
  - Arts & Culture
  - Education
  - Emergency Relief
  - Environment
  - Healthcare/Medicine
  - Military/Veteran Service
  - Research
  - Social Service
  - Sports
  - Youth Development
  - Other – add a category not listed (cannot guarantee the addition of the category listed here)
- Social media profiles: Facebook, Twitter, Instagram
- Social media handles (i.e. #runhou)
- Quality photo to represent the charity (to be used for social media) - from race or event
- Short Message to be used for social media

## 2023 Run for a Reason Program Guidelines

During the application process, the Executive Director and Charity Administrator will be asked to acknowledge that they have read and understand items listed below, including the legal language at the end of the document. Please read carefully, so you have a full understanding of the program and its basic functions before applying and accepting a spot in the 2023 RFAR Program.

### 1. Charity Participation

Charities will be classified into tiered levels based on the number of runners that participate with that charity. Tier Levels are as follows:

Tier Level	# of Runners
Bronze	Up to 14 Runners (10 Runner Minimum)*
Silver	15-25 Runners*
Gold	26-50 Runners*
Platinum	51+ Runners*

\*Minimum 10 Half/Full FFR Runners

Returning Charities will be classified into a tier level based on the number of runners participating with that charity in the prior year event (As of December 1 associated with the prior year event, ie. for 2023, the number of runners as of December 1, 2021).

New Charities will automatically be Bronze tier level charities. They will have the opportunity to move to a different tier level through registrations. The number of committed runners that a new charity has as of Global Running Day (GRD) preceding the event will determine their tier level for the first year.

Number of Runners is defined by 5K FFR, Half Marathon FFR, Marathon FFR, HERO, Corporate Partnership Program (CPP) runners.

Ten Runner Minimum is defined as ten Half Marathon FFR, Full Marathon FFR, Half Marathon CPP, Full Marathon CPP Runners.

An annual, one-time administrative fee will be assessed to each official charity to cover costs related to participation in the RFAR Program based on the tier level of participation. If selected, you will be invoiced at a later date and agree to pay the invoice by the established deadline.

Tier Level	Administrative Fee \$
Bronze	\$150
Silver	\$175
Gold	\$200
Platinum	\$225

Returning charities will need to re-apply yearly for the following year's program. They will be automatically accepted as long as all requirements are met.

New charities will apply to the program and will be notified of acceptance after review by the committee.

Applicants will be notified of acceptance or denial on or before November 30, 2021. Charities should not announce their acceptance publicly until instructed to do so by the HMC.

Organizations accepted as official charities acknowledge that participation in the RFAR Program is a commitment beginning December 2021 and ending in February 2023, with the busiest months occurring October through January.

## **2. Administration & Program Management**

It is expected that essential information such as: changes in staff, contact information, office move, etc. must be promptly reported to the Charity Program Manager ([arayner@houstonmarathon.com](mailto:arayner@houstonmarathon.com)) and updated in the appropriate locations in a timely manner.

Additionally, it is expected that each official charity will actively promote their participation in the RFAR Program on their organization website, in newsletters, on social media and other methods the organization deems effective.

The charity will be permitted to use the HMC logos and graphics. However, use of HMC logos and graphics is prohibited unless authorization is given by the HMC. Failure to comply will result in the removal of the charity's ability to participate as an official charity.

Official charities and their fundraisers must use the fundraising platform provided by the HMC. Donations made through other sites will not be accepted.

Charity will be expected to participate in a Hoopla Station or Charity Village at RunFest.

The role of Charity Administrator must be assigned to a paid staff member of the organization. It is acceptable for other organization staff, board members and volunteers to assist on this project, but the ongoing accountability of the organization's participation and performance must be through one paid staff member.

The role of Charity Administrator is to manage all aspects of the organization's participation in the RFAR Program. This includes, but is not limited to:

- Educating your constituents about your participation in the program & promoting the opportunity to participate
- Recruiting individuals, corporate partners, etc. to participate in the race through your organization
- Promoting the Fundraise for Registration (FFR) & Donate for Registration (HERO) options
- Monitoring the fundraising progress of participants & the charity
- Providing participants with the fundraising tools necessary to reach their goals
- Managing and branding your charity specific portal and charity fundraising page
- Creating an "incentive program" that rewards participants for achieving and exceeding fundraising goals
- Acknowledging and receipting donors
- Coordination of participation in Hoopla Station or Charity Village
- Representing the organization at events with required attendance such as:
  - Orientation session (Spring 2022)
  - Any additional requirements named by the HMC
- Communicating regularly with HMC Charity Program Manager

## **3. Registration Options & Fees**

Race registration fees listed below are special rates for official charities only and will not be impacted by scheduled price increases for the public or sell out of the open field.

- Chevron Houston Marathon: TBD
- Aramco Houston Half Marathon: TBD
- We Are Houston 5K: TBD

*Fundraising for Registration (FFR) Entry*

An FFR entry is valued at a minimum of \$500 (half/full) or \$250 (5K), plus the registration fee - which must be covered by the charity. Official charities can increase the fundraising minimums and will have the opportunity to indicate the desired minimum during the registration process. The registration fees associated with each race are listed above. Participants commit to fundraise the required amount with the understanding that they will receive a race entry, once that minimum has been reached. In the event a participant does not complete the fundraising requirement, the charity will have the ability to charge the individual the difference. Participants are required to fundraise on the platform provided by the HMC. Each official charity is responsible for the management and promotion of these race entries. FFR race entries are non-refundable.

Each official charity must have at least ten (10) Fundraising for Registration (FFR) participants in the Chevron Houston Marathon or Aramco Houston Half Marathon. If a charity does not have ten (10) FFR participants, the charity will be responsible for the registration fees of the remaining entries. Charities will be invoiced by HMC at the half marathon charity rate per unused entry.

*Donate for Registration (HERO)*

Each official charity has access to a limited number of HERO entries provided by the HMC at no cost to the organization. The cost of a HERO entry for a participant is a one-time, upfront donation of at least \$350, plus the registration fee for the chosen race. Purchase of a HERO entry must be completed in one transaction and does not allow for donations to be collected from multiple sources. The charity is responsible for promoting these entries and for sending an acknowledgement and tax receipt to each participant. The HMC provides HERO participants with race weekend incentives.

**4. Fundraising Requirements**

Official charities are asked to raise a minimum amount each program year based on the tier level they are participating at (first year charities will have a \$5,000 minimum fundraising requirement). The fundraising minimum must be met by February 1<sup>st</sup> following the date of the race.

Tier Level	Fundraising Commitment
First Year Charity	\$5,000
Bronze	\$7,500
Silver	\$15,000
Gold	\$22,500
Platinum	\$25,000

\*Returning 2022 Charities will be classified into the tier level based on the number of runners they have for the 2022 event.

Charity fundraising minimums are a goal, if goal is missed two years in a row, then charity will be moved to bronze level and will be eligible to be a charity as long as 10 FFR minimum is being covered. If charity fails to meet the requirement, they will forfeit their participation in the program for the next year.

**Donations**

Donors will have the opportunity to cover the processing fee associated with their donation to a participant.

The Corporate Partnership Program is available to official charities to help engage corporations in the RFAR Program.

**Indemnity Clause**

The undersigned organization ('charity') has read and agreed to the terms and conditions contained herein and in the application correspondence email it received from the Houston Marathon Committee, Inc. (HMC), and shall comply with all requirements, and shall indemnify, defend and hold harmless the HMC and the Houston Marathon Foundation, Inc. (HMF) and all of its sponsors, vendors, partners and all of such parties' respective directors, officers, employees, agents and representatives (collectively, the "indemnified parties"), from all claims, liabilities, losses, costs, damages, liens, judgments and expenses (including, but not limited to, attorney's fees and court costs), resulting or arising or alleged to result or arise, directly or indirectly, from any and all injuries to or death to any person or damage to or loss of any property which arises or is claimed to arise from any event related to the charity's participating in the Run for a Reason Program or any HMC or HMF

event(s), to the extent that such claim is the result of or caused by the negligent act or omission of the charity, its directors, officers, employees, volunteers, agents or representatives, or the gross negligence or willful misconduct of such parties.

#### **Final Acknowledgement**

The Houston Marathon Committee, Inc. reserves the right to reject the undersigned organization's application for, or remove the undersigned organization from participating in, the Run for a Reason program at any time and for any reason, including, but not limited to, legal matters and reputational risks associated with your organization, underperformance of goals associated with the Run for a Reason program, and lack of engagement in the Run for a Reason program.

Please remember that this application is due no later than **Friday, October 15, 2021**. Incomplete and late applications will not be considered. Applications cannot be emailed or faxed. Hardcopy applications will not be accepted. Information collected in this application is used by the Houston Marathon Committee for internal review and will not be shared. Charities will be notified of acceptance or denial on or before November 30, 2021 after the selection process is complete.

Contact Augie Rayner at [rfar@houstonmarathon.com](mailto:rfar@houstonmarathon.com) with questions.

**The Houston Marathon Committee, Inc. (HMC) is a 501(c) 4 non-profit organization and contributions made to the HMC are not deductible as charitable contributions for federal income tax purposes.**

## Supporting Documentation

The following supporting documents must be submitted through the provided online link as a part of your RFAR application. Your application is not complete and will not be considered if any of the attachments are missing. Prepare these documents in advance and attach them during the online application process.

\* Required document for new applicants. Returning 2022 RFAR Official Charity partners will only need to submit the following documents if there have been changes from your submission in November 2020.

\*\* Required document for returning and new applicants.

### **Attachment A: Organizational Status\***

New Applicants must submit at least **ONE** of the following:

- A copy of your local organization's Better Business Bureau accreditation status
- A copy of your local organization's Charity Navigator report, showing the "Current Rating" page, with completed information
- A copy of your local organization's GuideStar report, showing the "General Information", "Financials" and "People" pages, with completed information

Returning Applicants must submit any documents relevant to a change in organizational status since submitting your last RFAR application in November 2020. This includes changes in status with the IRS, Better Business Bureau, Charity Navigator, GuideStar or in the way your organization is perceived by the public.

### **Attachment B: IRS Filing\***

A signed copy of the organizations most recently filed Internal Revenue Service tax document (Form 990). If the Form 990 EZ is filed, fill out the first two pages of the standard Form 990 and attach them to the 990 EZ filed form.

### **Attachment C: Organization Goals & Milestones\***

*All organizations should submit answers that address the below. You may also include any special milestones achieved in the RFAR Program or address what will be done in the short term (next 3 months) and long term (next 6-12+ months) to increase future performance and productivity in the program.*

- 1) Explain why being a part of the RFAR Program is important to your organization and how the funds raised will directly impact the Houston community.
- 2) Submit a business/marketing plan for your organization's participation in the 2023 RFAR Program, specifically outlining how the organization will recruit and incentivize participants. Touch on what methods have worked in the past and which have not.
- 3) Include any other information that is important for the selection committee to know.

### **Attachment D: Organization Logo\*\***

Provide your organization logo in .png and esp format.

### **Attachment E: Board of Directors Letter\***

Letterhead listing the voluntary Board of Directors that sets the policies and oversees the activities of the organization.

**Attachment F: 501 (c) 3 Determination Letter\***

A copy of your charity's 501(c) 3 determination letter. This is the IRS determination letter indicating that the applicant organization is exempt from taxation under Section 501(a) of the United States Internal Revenue Code as an organization described in Section 501(c) 3 of that Code and to which contributions are deductible for income tax purposes under Section 170 of the Code.

**Attachment G: Audit Report\***

A copy of the organization's most recent audit or message from a CPA or accountant attesting that the organization's financial statements are in accordance with generally accepted accounting principles and do not require modification.