INTRODUCTION

In today’s world, it is vitally important for every chartered group of Mended Little Hearts to keep careful track of group finance records and manage group finances appropriately. In this manual, there are policies about managing a MLH group treasury and other helpful information. If you have any questions, please don’t hesitate to contact the national office.

All groups should have a person on the leadership team to act as Group Treasurer. This person manages and oversees all financial aspects of the group. This person may be the Group Coordinator, particularly when the group is new, but it is often a good idea to find someone specifically for this role.

The computer can be a very helpful tool in assisting a Group Treasurer. This manual will not be specific to any particular computer operating system. Regardless of the operating system you have, whether you use a PC or a MAC, it is assumed that the operator will know how to accomplish the required tasks on his or her system. General terminology, such as “database” and “spreadsheet” will be used with the assumption that the meaning is understood.
# TABLE OF CONTENTS

**INTRODUCTION** ................................................................................................................................................. i

**SECTION I - FINANCIAL FACTS** ................................................................................................................................. 1
  Corporate Status ......................................................................................................................................................... 1
  Tax Status ................................................................................................................................................................. 1
    Exemption
    Contributions
    National Dues
    Expenses
    Gross Income Over $25,000
    State Income Tax Exemption
  Sales Tax Exemption ................................................................................................................................................ 2
  Non-Profit Organization Bulk Mailing Permit ........................................................................................................... 2

**SECTION II – GENERAL INFORMATION FOR TREASURERS** .................................................................................. 3
  Bank Accounts .......................................................................................................................................................... 3
  Keeping Records ...................................................................................................................................................... 3
  Creating a Budget ..................................................................................................................................................... 4
  Fundraising ............................................................................................................................................................. 5
  Donations from MLH Group to Others .................................................................................................................... 6
  Bonding ................................................................................................................................................................. 6
  Audits ...................................................................................................................................................................... 7
  Reporting ............................................................................................................................................................... 7

**SECTION III – ANNUAL REPORTS** ............................................................................................................................... 8
  How to complete ....................................................................................................................................................... 8
  Sample Form ........................................................................................................................................................... 9

**SECTION IV – MEMBERSHIP/ANNUAL CHARTER FEE** ............................................................................................. 11

**APPENDICES** .......................................................................................................................................................... 12
  Sample Donation Thank-You Letter .......................................................................................................................... 12
  Sample Receipt ........................................................................................................................................................ 13
  Fundraising Tried and True .................................................................................................................................... 14

THIS MANUAL, OR ANY PARTS THEREOF, MAY NOT BE USED OR REPRODUCED IN ANY MANNER WITHOUT WRITTEN PERMISSION. FOR INFORMATION, WRITE TO THE MENDED HEARTS, INC., NATIONAL OFFICE, 8150 N. CENTRAL EXPRESSWAY M2248, DALLAS, TEXAS 75206. CHAPTERS AND GROUPS CHARTERED BY THE MENDED HEARTS INC. MAY REPRODUCE ANY OR ALL PARTS FOR THEIR USE IN THE CONDUCT OF CHAPTER ACTIVITIES.
SECTION I
FINANCIAL FACTS

CORPORATE STATUS

The Mended Hearts, Inc. (National) was incorporated in 1955 in the Commonwealth of Massachusetts, and therefore operates under the corporate laws of that state. The President, Executive Vice President and the Corporate Secretary constitute the Administrative Board for the purpose of any corporate functions with any local, state or national government agency. The President, with approval of the Board of Directors, shall appoint one of the Board members to serve as Corporate Secretary.

Mended Hearts' chapters and Mended Little Hearts groups are not to incorporate at any time, as they are considered units of the national organization.

TAX STATUS

Exemption - The Mended Hearts, Inc. is exempt from federal income tax as described in Section 501(c) (3) of the Internal Revenue Code, as it was shown that The Mended Hearts, Inc. was organized and operates exclusively for educational and charitable purposes. This exemption was established by determination letters from the Office of the Commissioner of Internal Revenue dated April 11, 1956, October 20, 1970 and most recently, January 2006. A copy of the letter can be obtained as needed from the National Office. Mended Little Hearts, as a program of Mended Hearts, also has the same tax status.

Groups that do not comply with the Group Exemption requirements listed below may jeopardize the tax-exempt status of the entire organization and will therefore be subject to charter revocation for non-compliance.

Contributions - Contributions made to Mended Hearts and its subordinates (chapters and Mended Little Hearts groups) qualify as a deduction by the donors when computing their taxable income. It is often very helpful to give donors a receipt. There is a sample in the appendices.

Expenses - Specific expenses incurred by members when serving the organization and attending meetings, workshops or annual meetings (conference), etc. that are not reimbursed may qualify as a tax deduction. (Members should consult their tax consultant or accountant.) If you were reimbursed by your group, the expense cannot qualify as a tax deduction. Also, the meeting, workshop, etc. attended MUST be for the benefit of your group or to help you lead the group and not for personal reasons.
**Gross Income Over $25,000** - The Treasurer is required to file IRS form 990, Return of Organization Exempt from Income Tax, if gross income has reached $25,000 or more in each of the past two fiscal years.

**State Income Tax Exemption** - Most State Tax Departments honor the Federal IRS Income Tax Exemptions, and allow State Income Tax exemption. However, some form of annual reporting is required by particular states under certain conditions. The National Office completes these reports and submits to appropriate governmental offices with payment.

**SALES TAX EXEMPTION**

Mended Little Hearts groups should obtain sales tax exemption from their local or state tax commission. Applications for this exemption must be accompanied by copies of IRS letters, national Bylaws, and specific material that is requested by the particular agency. The IRS determination letters are not to be used for nonpayment of sales tax on items purchased, but are to be used only to document a group's application for state or local tax exemption. You will need appropriate state or local documentation to be exempt from state or local taxes.

In some states, you can obtain sales tax exemption store-by-store. You can ask to see what kind of documentation the store requires and then apply for the exemption. Some stores also give non-profits a discount.

**NON-PROFIT ORGANIZATION BULK MAILING PERMIT**

Groups that have group exemption status under IRS are eligible for third class bulk mailing rates under the provisions of the U.S. Postal Service (623.DMM) and upon mailings are required to certify that: (1) The mailing does not violate section 623.5DMM; (2) Only the mailers' matter is being mailed; (3) It is not a cooperative mailing with other persons or organizations that are not entitled to special bulk mailing privileges; and (4) The mailing has not been undertaken by the mailer on behalf of or produced for another person or organization that is not entitled to special bulk mailing privileges.

Groups with monthly mailings of at least 200 pieces can apply for the permit at their local post office.

Copies of the IRS determination letters, National BYLAWS, and additional specific material, if requested by the U.S. Post Office, must accompany application for this permit.
SECTION II

GENERAL INFORMATION FOR TREASURERS

It is very easy for group finances to fall under scrutiny by group members and by those outside of the group. For this reason, we have created policies for managing a group treasury that groups should adhere to for their own benefit as well as the benefit of the MLH organization.

BANK ACCOUNTS

Groups should open a bank account as soon as possible after obtaining their Employer’s Identification Number from the national office. Some banks will provide accounts free of charge to non-profits.

Most of the time, you will need the EIN letter and a copy of the bylaws when opening an account. You may also need the minutes of your organizational meeting or of a meeting you had where officers are listed. Most banks require a president and treasurer listed on the minutes.

The group’s checking account should include the name of the group with authorized signatories of the treasurer and at least one additional coordinator who is not related to the treasurer.

All donations should be deposited into the account as soon as possible and a receipt of the deposit should be kept by the treasurer. If possible write onto the receipt where the donation came from or what it was for.

It is HIGHLY recommended that any expenditures for over $100 be approved by the group leadership of at least three people. This will ensure that the group is on the same page in terms of spending. For example, if the group wants to purchase an item costing over $100, the group coordinator, educational coordinator, and visiting/outreach coordinator should all approve that expense. Approval might be required from additional team leaders as well depending on the group’s leadership team.

KEEPING RECORDS

The Group Treasurer must keep careful records of group finances including:

- Obtain copies (or print them) of all bank statements. Bank statements should be shared with group leadership (all group coordinators) each month. They can be shared at business meetings or by email. Bank statements should be kept in a file accessible to the lead coordinator and at least one other coordinator upon request.
• Keep receipts for all MLH purchases (and having other MLH leaders do so as well). It is a good idea to keep all receipts in one folder or have one folder for each month.
• When reimbursements are given, document them carefully. Keep a copy of the documentation.
• MLH does not allow the use of an ATM card for withdrawing cash from the MLH account; however, debit cards may be used to make purchases (similar to a credit card). Again, receipts should be kept for all purchases.

**CREATING A BUDGET**

As soon as possible after the group is formed, you want to create a budget for the group. First, it will be necessary for the group leadership to determine what the group would like to accomplish—the group’s mission-related priorities. Then, the leadership will want to determine the cost for each priority. Of course, the first year your group is in existence, it will be hard to determine many of these numbers (how much things cost), but you can ask other groups (particularly via the yahoo group) about costs associated with many things.

**Example:**

**Group Meetings**
- Speaker (volunteer speaker, but speaker gift given) $10.00
- Refreshments (will get donated, if possible) $25.00
- Printing flyers/meeting information $10.00
- Room (donated) $0.00
  **$45.00**

**CHD Awareness**
- Printing CHD Awareness brochures $150.00
- Hosting CHD Awareness celebration $1,000.00
- Advertising in local publication $150.00
- Creating Display $200.00
- Purchasing bracelets and other merchandise $200.00
  **$1,700.00**

**Care Packages**
(These cost about $35 each unless you get items donated.)

**Operations**
- Postage $25.00

**Educational**
- Web site development (talk to local high school or tech school about pro-bono work)
- Brochures (provided by national office)
- Posters (provided by national office)
Sending additional coordinator to leadership training at MH Convention $800.00

**Social Events**
- Summer Picnic $200.00
- Holiday Social $200.00
  - **Total $400.00**

**Total $2970.00**

Your group’s leadership should approve the budget in a formal leadership meeting. Once you create a budget, you can determine your fundraising needs.

**FUNDRAISING**

Your group will want to do some kind of fundraising so that you have money to do some events and to support others. Initially, this may consist of talking to different groups about Mended Little Hearts and your group. This will often result in some donations to your group.

Groups may engage in fundraising activities that are designed to raise funds in the amounts needed for normal group operating and educational expenses, including expenses to send members to annual meetings (leadership training conference), regional workshops, and for heart-related purposes. Groups may also raise funds for worthwhile mission-related community projects and heart research. Any projects intended to generate amounts in excess of $15,000 must have the approval of the Mended Hearts Board of Directors. **Fundraising ideas, in the form of a Fundraising Tried and True document, are in the appendices of this manual.**

When creating print materials for fundraising, be sure to get approval from the National Committee Chair and/or the National Program Director before printing.

All donations need to be acknowledged in writing. For donations of significant amounts ($5,000 or more) consideration should be given to giving part of the proceeds to support National Mended Hearts/Mended Little Hearts, particularly to help with our national leadership training conference.

Donated funds can be “restricted” or “non-restricted.” “Restricted” funds may only be used for the purpose intended by the donor (for example, if you get a donation for care packages, it must be used for that purpose only). “Unrestricted” funds, donations made to your group or for no specified purpose, may be used for general operations or for a purpose determined by the group.
Donated funds can be used for any purpose that is mission-related. The MLH mission is “Mended Little Hearts provides hope and support to children, families, and caregivers impacted by congenital heart defects in order to extend and improve quality of life.”

Also, fundraising cannot be done to specifically benefit a particular patient or family. For example, your group cannot have a fundraiser for the Jones family. MLH members could attend or help with a fundraiser for a family, but it cannot be sponsored/hosted by the group. As the need for financial assistance is so great, and the ability to identify the person(s) most in need is so difficult, groups are discouraged from providing any direct financial assistance to families. If asked, you can be clear that we are glad to give emotional support, but we don’t have the resources to provide financial support to all families in need.

Decisions regarding any proceeds from fundraising activities will be made by the Group Coordinators.

Groups shall not use The Mended Hearts, Inc. IRS non-profit exemption (GEN) or The Mended Hearts, Inc. national or Chapter’s Employer’s Identification Number (EIN) to conduct any form of public participation gambling that is regulated by a government agency or requiring registration of the GEN or EIN. Donations and prize drawings commonly used by charitable organizations are acceptable.

**DONATIONS FROM MLH GROUPS TO OTHERS**

Often MLH groups use funds to donate to other organizations in a way that will benefit CHD families. For example, groups often donate to CHD research. When donating, ask questions to be certain that the funds are going where you think they are going. Some organizations, for example, claim to give to CHD research, but unless this is specified on the check, the majority of the donation will NOT go to CHD research.

Some suggestions for donations that help families with children who have CHD are: The MLH National organization (particularly towards leadership training and CHD Awareness), your local children’s hospital, the Children’s Heart Foundation, the Ronald McDonald House, the Adult Congenital Heart Association, Saving Little Hearts, Tiny Hearts Superheroes, organizations that help children with Down’s Syndrome (about 50% have CHD), camps for kids with CHD, and local early intervention programs, to name a few.

**BONDING**

Groups with funds in excess of an ending balance of five thousand dollars ($5,000) must bond the treasurer and all signatories on checking and savings accounts and submit a copy of such bond to the MHI National Office, 8150 N. Central Expressway M2248, Dallas, TX 75206. This is required per National Bylaws Article VIII Section 7. Bonding is most often handled through a local insurance agent. If you have questions, please contact the national office.
ANNUAL REVIEW OF CHAPTER FINANCES

Good business practice includes an annual review/audit of financial records; therefore, it is recommended, if possible, that the Group Coordinator seeks to have the group’s financial records reviewed/audited annually. The review/audit can usually be accomplished at no charge to the group if a group member with accounting experience completes the review/audit or if group leaders know someone with an accounting background.

REPORTING

Your group will be required to fill out an annual report each year and send a copy to the national office (See Section III below). There are pages for reporting group finances. Please review the copy of the report in the appendices so you know what kinds of records should be kept for the national office. This information will also be helpful for your group’s own fundraising efforts.
SECTION III

ANNUAL REPORTS

At the end of each fiscal year (December 31) group treasurers are required to provide financial data to the National Office as part of the Annual Report. Forms are sent to each Group Lead Coordinator to be completed. A copy of this report is on the national Web site in the coordinators’ section.

Annual Financial Report

The Annual Financial Report form (part of the group’s Annual Report) will be given to the Treasurer each year by the lead coordinator. IRS REQUIRES ALL GROUPS TO SUBMIT AN ANNUAL REPORT TO THE PARENT ORGANIZATION.

Preparation of Reports:

- It is very important to include the name of the financial institution, account number and signatories on the report.

- Expenses are categorized as educational expenses or operational expenses and specific purposes for disbursements for each category notated.

  - Disbursements for educational purposes might include: 1) printing and mailing of group newsletter/Web site costs, 2) printing of educational and visiting material, 3) support/care packages, 4) providing funding for group leaders to attend our national leadership training, 5) costs for members to attend workshops and/or national conference, etc.

  - Disbursements for operational purposes might include: 1) office supplies, 2) paper for printing, 3) stationery, 4) cost of providing meeting space and refreshments, etc.

Monies that are in savings accounts and investments must be shown as assets and the purposes of such funds notated. Furthermore, the entire balance on hand must be itemized and earmarked under assets as to purpose intended for use. An amount equal to the normal operating expenses of the group for a year may be earmarked for that purpose.

NOTE: The Mended Hearts, Inc. is responsible for the actions of all its chapters and Mended Little Hearts groups; therefore, strict compliance with the above is required.
## VI. Financials

<table>
<thead>
<tr>
<th>Name of Financial Institution</th>
<th>Account Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Signatories (please print)</td>
<td></td>
</tr>
</tbody>
</table>

### A. Balance Carried Over from Previous Year: $__________

### B. Income

1. Special Projects/Fundraisers* $__________
2. Grants* $__________
3. Private Donations $__________
4. Interest Earned $__________
5. Other* $__________
6. Total Income for Fiscal Year (Jan 1 - Dec 31) $__________

### C. Combined Total (Items A & B.6) $__________

### D. Expenses

1. General
   a. Group Charter Fee $__________
   b. Purchase of Items from National $__________
   c. Purchase of Merchandise $__________
2. Educational
   a. Conferences or Meetings $__________
   b. MLH Coordinators’ Training $__________
   c. Care Packages & Visiting Packets $__________
   d. Funding for Research $__________
   e. Other Support to Others $__________
   f. Newsletter/Web site $__________
   g. Advocacy $__________
   h. Misc. $__________
3. Operating
   a. Office Supplies $__________
   b. Postage $__________
   c. Member Events $__________
   d. Misc. $__________
4. Special Projects/Fundraisers* $__________
5. Total Expenses for Fiscal Year $__________

### E. Balance on Hand at End of Fiscal Year $__________

---

## VI. Financials Continued

### A. List grantors (who grants were received from): ________________________________

### B. List organizations (including funding for research) supported by your group: ________

---

9
C. List items provided in care packages and visiting packs: 

________________________________________
________________________________________
________________________________________
________________________________________
________________________________________
SECTION IV

MEMBERSHIP/ANNUAL CHARTER FEE

The Group Treasurer will need to work with the other coordinators to keep records of the number of families who are members of the group.

ANNUAL CHARTER FEE

It is the responsibility of each group to pay an annual charter fee. The fee is due the January following your group’s original chartering and annually in January thereafter. The charter fee is sent to the National Office and is assessed based on group size as follows:

- Up to 20 members: $100
- 20-50 members: $200
- Over 50 members: $300
APPENDIX A
SAMPLE DONATION THANK-YOU LETTER
Please customize this letter and place on MLH Letterhead (found on the coordinators’ site).

Month Day, 2011

Address:

Dear _______

Thank you for your contribution of $___ to Mended Little Hearts (of put group name here). We greatly appreciate your generosity.

As congenital heart defects are the number one birth defect in the United States, many families and caregivers are faced with the difficult emotions and feelings of helplessness involved in caring for a child with a heart defect or heart disease. While the medical advances associated with the treatment of heart-related illnesses continue to improve, the emotional aspects associated with heart defects and heart disease often linger with families longer than one anticipates.

Thanks to your support, Mended Little Hearts will offer valuable health information and family-to-family hope and encouragement to “the littlest heart patients of all.” Please retain this letter as proof of your contribution for federal income tax purposes.

Sincerely,

(Name)
Group Coordinator
(Group Name)

Contribution to: Mended Little Hearts, a program of The Mended Hearts, Inc.
Employer Federal ID # (put group EIN number here)
APPENDIX B

RECEIPT

A receipt system for received income should be established. Receipts should be provided for cash from any source:

Receipt Example:

<table>
<thead>
<tr>
<th>ACCOUNT</th>
<th>HOW PAID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amt. of ACCT.</td>
<td>CASH</td>
</tr>
<tr>
<td>Amt. Paid</td>
<td>CHECK</td>
</tr>
<tr>
<td>Balance Due</td>
<td>Money Order</td>
</tr>
</tbody>
</table>

By ____________________________
Fundraising

Fundraising is rewarding, uplifting, powerful, instrumental work. It takes communication, organization, skill and most of all passion. The work that we do in MLH is crucial to our families success. And we need the funds to do this work. Monies are needed for tangible things like Bravery Bag items, social events (food, paper products), print flyers, print nametags, print coordinator business cards, cover babysitting costs for educational meetings.

Monies are also needed for things that don’t seem as tangible, but are JUST AS IMPORTANT! No one would argue that education isn’t important. We hold the education of our own children as one of the top priorities in their lives. So why would we not value the education of ourselves in the same regard? Our families expect us to be a knowledgeable, practiced support group that is trained in what we do and how we do it. Our hospitals expect us to be professional and to uphold our solid reputation as they open their doors to us. Therefore, our own training and education is critical to our work. These are things like travel costs for education conferences, educational conferences fees, and even travel and hotel stays for advocacy. After all the advocacy work is free! But we can’t be as effective unless we are physically present and that takes money!

The biggest way to succeed in fundraising is sharing your own story. Craft a brief yet impactful synopsis of your child’s story that you can share anywhere, in an elevator, coffeeshop, gas station, etc. It should consist of just a few sentences of your child’s medical experience and prognosis for the future, and a fact about CHD (number one birth defect). If the conversation continues, also include a call to action. It may be as simple as asking the person to share your story, share the message with another family who may be experiencing something similar, ways to get involved like help with Bravery Bags or a location to host a meeting a event. Or, it may even close the option to help fund a project!

While we need to be prepared to get “no’s,” keep in mind that a “no” doesn’t mean MLH is not worthy or important, or even that “no” might be a “not right now but at a later time.”
This document has ideas groups can use for fundraising that have been used by our groups around the nation. **Note:** If you are submitting a grant request to the national headquarters of an organization in your area, please check with the national office to make sure we haven’t already submitted a grant request. Likewise, if you have a national headquarters in your area and would like to submit a joint local and national grant, let us know so we can help.

**Ideas to get you started:**

- People give to people. Funders want to fund something that clearly makes a difference in the community. The objective is to match the donors’ goals and dreams to the needs of MLH. Ask your potential donor what interests them. Here are some examples.
  1. Donor interested in medical research and education? Ask them to help fund educational meetings or fund advocacy for your group. (which means the travel to get to D.C. to do the work of advocacy!)
  2. Donor interested in taking care of families in the hospital? Ask them to provide funding for bravery bags?
  3. Donor interested in creating fun times for families? Ask them to fund a social!
  4. Donor interested in MLH maintaining its solid reputation in the community? Ask them to fund education for its leaders. Coordinator education is CRUCIAL to continuing and developing our strong reputation among our families and our hospitals.

- Special projects that your group is working on are often very fundable. Be clear about your budget before asking for funds.

- You are far more likely to get donations from individuals than you are from grants. This doesn’t mean don’t apply for grants, but know that they are a lot of work and you will get more “no’s” than “yeses.”

- Decide how much money your group needs to operate effectively or for the project you need funded. This includes in-kind donations, like items for care packages. That will help you determine what type of fundraising you will want to do. You should develop a budget before fundraising.

- Determine ahead of time how much time and energy you have for fundraising. Different fundraising ideas require different time and energy (and even sometimes resources). You want to choose fundraising options where you get the most funds possible for the least amount of time and energy.

- Susan Vanderpool of our Tulsa group suggests that parents take their heart children with them when asking for donations so people get a feel of who they are donating for. “I say
something like, ‘I am Susan, a coordinator for MLH of Tulsa, a support group for parents who have children born with heart defects and this is my mended little heart, Max.’ (It also helps that Max loves showing off his belly.” Susan suggests that you ask for specific donations (for something specific), and that you make it is clear that the donation is to help kids.

❤ Other CHD parents might have a hard time finding the time to seek donations or are unable to give to the group themselves, but grandparents and other relatives can often help get donations, and they sometimes like to donate to help the group.

❤ Determine ahead of time how you are going to communicate to your members (and to the local community, if appropriate, about your fundraiser) and what materials/resources will you need to do a fundraiser? Remember to blind copy all participants to protect your MLH email list members!

❤ If you need help and advice, please post on our coordinator Facebook group. There are probably others who have done similar fundraisers.
Fundraising Ideas

There are many different ways of raising funds for MLH groups. Below are some examples and things to take into consideration. Bear in mind, this list is in no way exclusive. It has been organized in order of least intensive fundraising ideas to most intensive that will require the most amount of work. The first step is to ask your members or your contact list for people that can help. Do they work for a business that could assist?

As you try other ideas, please let us know so we can update this document.

Beginner Ideas
- Join a fundraiser that ALREADY exists!
  - It can be very helpful to work with other organizations that support CHD goals when fundraising. Partnering with others can make your fundraising bigger and ultimately result in more funds for everyone. Be sure your partners are valid 501(c)3 organizations that truly have a good purpose—do your research. Some good partners for MLH are:
    - Read your local newspaper or check out radio station web sites. There are groups that are already fundraising. See what’s going on and contact these organizations to see if MLH can get involved.
    - Many of your own members have created their own foundations. Work with them toward a common goal and fundraise for a joint project.
    - Other organizations that may be good partners are:
      - Ronald McDonald Houses
      - Local hospital that does CHD research or CHD procedures
      - Starlight
      - Make A Wish
      - Children’s Heart Foundation (CHD research)
- Partnering with restaurants—There are many restaurants who will give MLH a percentage of their profits for all sales for a period of time. For example, there are restaurants who will have a night where a certain percentage of sales, no lower than 10%, for that night go to the MLH group. The MLH group is responsible for getting the word out and bringing people in so they can get as much money as possible.
  - Some examples of partnerships are:
    - Chick Fil A
    - Beef O’Brady’s
    - Pizza Hut
    - Bruster’s Ice Cream
    - Max &Erma’s
    - Rib Crib
    - Culvers
    - Applebees
- Noodles & Company

- Partnering with businesses
  - Grocery stores - some, like Kroger, have programs where shoppers get a card and non-profits can earn money based on a percentage of sales from those shoppers. These are often called Customer Appreciation Cards.
  - Mortgage Companies (some will give a percentage of the loans)
  - Local schools and PTA’s will often do fundraisers for non-profits
  - Church groups might also help raise money and do fundraisers
  - Boy Scout, Cub Scout and Girl Scout troops often need to do fundraisers and may do one for MLH

- Partnering with local foundations - It can be very helpful to work with other organizations that support CHD goals when fundraising. Partnering with others can make your fundraising bigger and ultimately result in more funds for everyone. Be sure your partners are valid 501(c)3 organizations that truly have a good purpose—do your research. Some good partners for MLH are:
  - Other local foundations that are founded by heart families (possibly some of your own local member families.)

- T-shirt sales - MLH National has pre-designed T-shirts to sell. Use Booster.com to manage the entire sale and handle payments, or you can sell them yourself. If you choose to design your own shirt, there is a list of approved shirt designs in the coordinators portal of the MLH website. If you have any questions about your shirt design, please contact MLH national.

- Paper Heart sales - Use the template of a paper heart and sell in $1, $5, $10 and $20 increments to your business partners. They will then display the hearts at the business!

**Gift cards and/or in-kind donations:** It can often be easier to get companies to donate gift cards or merchandise to your group than money. These items can be used in raffles, auctions, or even in Bravery Bags. When you are eating out or spending money at a location, ask for a gift card or a donation for your event. Again, if you can bring your heart child, that can be helpful so they can see how adorable our CHD kids are.
Intermediate Ideas:

- **Selling Products**—Product sales can be a good source of income for groups. When figuring out what products to sell, you may want to determine:
  - **What is likely to sell.** Talk to other group leaders about what worked for them. Also, if people in your area are asking for a product (t-shirts, calendars, etc.), it might be a good one for your group members to sell.
  - **What profit-margin you will receive.** You want to make sure that you will get a profit-margin that is worth the effort you are making to sell the product. Make sure it is a reasonable percentage (over 10%).
  - **What you can get donated.** Sometimes people will donate services (like printing or embroidery) and that will allow you to make much more profit on the product. See if your group members have any connections.
  - Some common items that groups sell are:
    - Calendars
    - Holiday cards
    - Yankee Candles
    - Cookbooks
    - Magnets
    - License plate holders
    - Pampered Chef
    - Children’s Art projects
    - Teddy Bears
    - Wristbands
Some events—Events range from small and simple, like a bake sale, to large and complex, like a golf tournament. Be careful to pick something that your group is ready to handle. New groups may want to start small and increase in size as their membership and resources grow.

Less time intensive events:

- Bake sale (need a location such as local church or school, need volunteers to bake items, need volunteers to staff the table to sell items)
- Car wash (need a location such as a local business on a busy street corner, need volunteers, need supplies)
- Concession stands—Need volunteers to work concession stands at sporting events. (pro or minor league)
- Spaghetti dinner (need location, donations of food, volunteers)
- Garage sale or yard sale
- Sam’s Club Day--This is a great way to raise money and awareness. You bring lots of information about your group, have display boards of picture of the children and pass out some small giveaway (candy, pens, etc.). You usually can get Sam’s to match what you raise that day. Walmart will typically do the same thing.

Advanced Ideas

Events— These are more complex events which will take more time. It is highly suggested to have an event committee and delegate tasks! Encourage friends to help: grandparents, aunts and uncles, high school students looking for service hours and local university student groups!

- Poker Run (motorcycle drive)—this can be a larger, more involved event. The Jacksonville group, Central Virginia group and Sturgis, SD group have all done one if you need thoughts and ideas.
- Golf tournament—there is a lot involved in having one. Talk to a group (like Central Virginia) who has done at least one of these. There are many considerations when having an event of this size.
- Gala or other social gathering—This is another larger and more involved event. The St. Petersburg group has done this for several years, and they would be good to ask. Also, be sure not to conflict with the AHA Heart Gala if there is one in your area.
- Garden Tour
- Auction—You will need to get a lot of worthwhile items donated to have a successful auction. You also may want to have another event (dinner or gala) associated with your auction to draw people to it. Try to find someone who
typically runs auctions to donate his or her time to help you. The Rochester, MN group just did an art auction and would be good to contact.

- **Raffle**—You can do this in conjunction with another event. You will need to get donated items to raffle. Non-profits don’t need a license to do this, but in some states there may be issues with gambling so you will need to be sure to check. Mended Hearts does a raffle at the national convention, and they may have ideas to help you.

**Apply for Local Grants and/or Donations**—Some companies and organizations have formal grant processes where non-profits can apply for local grants. Bear in mind that grants are a lot of work, and you often have to have a contact at the organization to get “in the door.” It is a good idea to ask your group members if they have any contact at local organizations. Then, go and speak to that person if at all possible. In person or phone contact is best initially to develop a relationship.

The national office can give you thoughts and guidance on wording for these grants. It is often helpful to include quotes from docs and group members in your grant request. We have a national testimonials page, but you might create a local page. Photographs can also be very helpful. Be sure to check with the national office first so that we don’t overlap grant applications.

If you receive the grant, be sure to follow up with a sincere thank-you (include a picture or the event or the group, if possible). Even if you are denied, write a thank-you note to the company.

You also want to tell the organization what their donation accomplished. They might even use the information for some good press about MLH. A few examples of possible grant sources are:

- Walmart
- Sam’s Club
- Build-a-Bear
- Best Buy
- Dick’s Sporting Goods
- Pharmacies
- Pharmaceutical Companies
- Medical Device Companies
- Baby Products Companies
- Kohl’s
- Children’s Stores or Children’s Product Companies