Regional Directors
Assistant Regional Directors
MANUAL

For information, write to:
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Albany, GA 31707
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SECTION I

MENDED HEARTS REGIONAL MAP

Key:
- ♥ Northeast
- ♥ Mid-Atlantic
- ♥ Southern
- ♥ Central
- ♥ Mid-Western
- ♥ Southwest
- ♥ Rocky Mountain
- ♥ Western
REGIONAL DIRECTOR’S ROLE

A. Background
Regional Directors (RD’s) serve as the main link between chapters and the national organization, and as the administrative arm of the Board of Directors in assigned geographic region. Regional Directors act in a supportive and collaborative role with MLH groups located or being formed within their respective areas.

B. Qualifications
Regional Directors are important volunteers in the national organization, and they should have a strong desire and willingness to serve others. The following general qualifications are recommended for RD’s:

1. Possess administrative and organizational abilities.
2. Be willing to travel to national conferences, national training sessions, regional meetings, chapter site visits, chapter accreditation or reaccreditation, and to establish new chapters.
3. Be willing to speak with groups such as professional and civic organizations, the news media and interested persons within the region assigned, representing Mended Hearts as required.
4. Be an accredited visitor and participate in training.
5. Have held a position as chapter officer or chairperson.
6. Ideally has served as a ARD.
ASSISTANT REGIONAL DIRECTOR’S ROLE

B. Background

Assistant Regional Directors (ARD’s) are appointed by Regional Directors, subject to advance approval by the National President. ARD’s serve as the administrative arm of Regional Directors and perform duties as assigned by Regional Directors. ARD terms of office are concurrent with the terms of their RD’s. They are subject to reappointment after each national election. ARDs act in a supportive and collaborative role with MLH groups located or being formed within their respective areas.

B. Qualifications

1. Possess administrative and organizational abilities.
2. Be willing to travel to national conferences, regional workshops, national training sessions, regional connections, chapter site visits, chapter accreditation or reaccreditation, and to establish new chapters.
3. Be willing to speak with groups such as professional and civic organizations, the news media and interested persons within the region assigned, representing Mended Hearts as required.
4. Be an accredited visitor.
5. Have held a position as chapter officer or chairperson.
SECTION II

REGIONAL DIRECTOR AND ASSISTANT REGIONAL DIRECTOR RESPONSIBILITIES

A. RD Responsibilities

<table>
<thead>
<tr>
<th>Timeline</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quarterly</td>
<td>1. National Vice President – Chapter/Satellite Status Report.</td>
</tr>
<tr>
<td>Within 45 days after election</td>
<td>2. Evaluate ARD candidates recommended by chapters, officers or based on own experience.</td>
</tr>
<tr>
<td>Within 45 days after election</td>
<td>3. Appoint Assistant Regional Directors generally based upon number of chapters per ARD, geographic area and personal knowledge of a member who has excelled at the chapter level. Appointment and/or termination of ARD’s are subject to advance approval by the National President.</td>
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<tr>
<td>Within 60 days after installation</td>
<td>4. Develop regional goals (prior to annual meeting/conference if possible) to accomplish MHI goals.</td>
</tr>
<tr>
<td>Ongoing</td>
<td>5. Organize new chapter and satellite locations.</td>
</tr>
<tr>
<td>Ongoing</td>
<td>6. Maintain chapters in support of MHI objectives and annual goals.</td>
</tr>
<tr>
<td>Ongoing</td>
<td>7. Maintain records of activity within region. The following files should be communicated with national and/or kept for the time indicated below. Refer to the chapter retention of records schedule.</td>
</tr>
<tr>
<td></td>
<td>a) Correspondence for new chapters/satellites – 1 Year</td>
</tr>
<tr>
<td></td>
<td>b) Bank Statements as provided electronically – Term of Office</td>
</tr>
<tr>
<td></td>
<td>c) Records of revoked chapters – 2 Years</td>
</tr>
<tr>
<td></td>
<td>d) Awards for past three years for region</td>
</tr>
<tr>
<td></td>
<td>e) Awards for past 3 years for region</td>
</tr>
<tr>
<td>Ongoing</td>
<td>8. Update the National Office on the status of chapters relating to suspensions or disbandment’s.</td>
</tr>
<tr>
<td>Ongoing</td>
<td>9. Attend and participate in training seminars.</td>
</tr>
<tr>
<td>Ongoing</td>
<td>10. Assist the local host chapter, ARD, in planning and conducting Cluster in each area annually</td>
</tr>
<tr>
<td>Ongoing</td>
<td>11. ARD’s may use another regional RD or ARD, or qualified chapter leader, if they are located closer to the site requiring support/attention, for any purpose beneficial to MHI, including chartering new chapters, etc. Coordinate use of either with another region’s RD.</td>
</tr>
<tr>
<td>Period</td>
<td>Task</td>
</tr>
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<td>-------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Ongoing</td>
<td>12. Market Mended Hearts in new areas.</td>
</tr>
<tr>
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<td>13. Review, approve and submit expense reports.</td>
</tr>
<tr>
<td>Feb-April</td>
<td>15. Review annual reports submitted by Chapters.</td>
</tr>
<tr>
<td>May-June</td>
<td>16. Provide Board of Directors with annual assessments of chapters’ progress. A region status report will be furnished each year for the RD to fill out. The completed report will be included with the board meeting packet and the annual minutes of the Board of Directors.</td>
</tr>
<tr>
<td>As needed</td>
<td>17. When held, attend the national annual training and education conference and Annual Meeting of The Mended Hearts, Inc. Lead or assist in training workshops as assigned.</td>
</tr>
<tr>
<td>Oct-Nov</td>
<td>18. Submit for approval an annual regional budget. The RD is responsible for managing the annual regional expenses based on the approved budget.</td>
</tr>
<tr>
<td>End of Term</td>
<td>19. Turn over all regional files to the incoming RD. electronically as available</td>
</tr>
<tr>
<td>March-May</td>
<td>20. Appoint a Regional Awards Selection Committee to review the regional nominees.</td>
</tr>
<tr>
<td>Ongoing</td>
<td>22. Coordinate the training and orientation sessions for ARDs.</td>
</tr>
</tbody>
</table>

**Process for Appointing Assistant Regional Director**

- Regional Director recommends /nominates a candidate
- Candidate completes resume (located in Officers portal)
- Completed resume forwarded to national president for review and appointment
- National President confirms candidate to become Assistant Regional Director
- Staff sends official ARD appointment letter (email) with current national president's signature
- Copy of appointment letter sent to Regional Director
- Regional Director informs Database Manager of new ARD and identifies assigned chapters
- Regional Director notifies ARD assigned chapter presidents of new appointment

- The ARD term will end concurrently with the National President

- If the ARD continues into a new president term, the new President should have the opportunity to review and approve the ARDs

ARD appointment document templates located in Officers Portal:
- Blank Resume
- Sample Appointment Letter
## ARD Responsibilities

<table>
<thead>
<tr>
<th>Timeline</th>
<th>Responsibility</th>
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<tbody>
<tr>
<td>Monthly</td>
<td>1. Report to the Regional Director.</td>
</tr>
<tr>
<td></td>
<td>2. Be assigned specific geographical areas within the region.</td>
</tr>
<tr>
<td>Ongoing</td>
<td>3. Help maintain existing chapters and seek new chapter locations.</td>
</tr>
<tr>
<td>Ongoing</td>
<td>4. Be willing to attend and participate in national education and training</td>
</tr>
<tr>
<td></td>
<td>conference, regional connections, and national training seminars and</td>
</tr>
<tr>
<td></td>
<td>webinars within the designated region.</td>
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<tr>
<td>Ongoing</td>
<td>5. Perform other duties as assigned by the RD.</td>
</tr>
<tr>
<td>Ongoing</td>
<td>7. Provide activity on chapter and satellite development. Fiscal year</td>
</tr>
<tr>
<td></td>
<td>ends Dec. 31.</td>
</tr>
<tr>
<td>Quarterly</td>
<td>8. Participate in quarterly conference calls.</td>
</tr>
<tr>
<td>Yearly</td>
<td>9. ARD’s will visit their chapters at least once a year and make regular</td>
</tr>
<tr>
<td></td>
<td>contact with chapter officers with national updates.</td>
</tr>
<tr>
<td>Ongoing</td>
<td>10. ARD’s may visit chapters more often as needed for troubled chapters</td>
</tr>
<tr>
<td></td>
<td>11. Participate in a training orientation for the ARDs.</td>
</tr>
<tr>
<td></td>
<td>12. Build relationships with potential healthcare professionals, community</td>
</tr>
<tr>
<td></td>
<td>leaders and other health organizations to raise awareness and promote MH.</td>
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SECTION III

MARKETING & PUBLICIZING MENDED HEARTS TO POTENTIAL MARKETS

A. Background

1. Marketing Mended Hearts in areas where there isn’t a chapter will create interest and lead to more inquiries and new chapters.
2. The RD/ARD may coordinate marketing efforts with local community hospitals. Contact names should be freely distributed to local media, service organizations and other medical professional and patient advocacy groups.
3. Once a contact is made, the RD/ARD should make every effort to establish a chapter in the city.
4. For help with marketing MHI, contact the Field Services Director or Marketing at the National Office.

B. Pre-visit Contacts

1. RD/ARD’s should try to contact the major hospitals in their region that do not have HI chapters and set up an appointment to visit facilities and discuss Mended Hearts. Contacts typically are:
   a) Administration
   b) Administrator’s Secretary
   c) Volunteer Services Department
   d) Nursing Executive
   e) VP Marketing
   f) Cardiac Nursing Leadership
   g) Cardiologists and other Physicians
   h) Rehab Service Organization

2. Once contact has been made, prepare a cover letter and mail a packet of information that includes: Contact National for support.

   a) Contact names
   b) Visiting educational resources
   c) Heartbeat magazine
   d) Hospital letters of recommendations - includes support letters from partnering hospitals with active visiting programs on the significant role and value Mended Hearts plays in their patient care recovery process.

3. Follow-up with phone calls and make an appointment to meet with hospital personnel and local heart patients. Follow-up is essential!
C. **Presentation To Potential Site**

1. Present MHI policies and procedures and respond to any questions or issues.

2. Put into practice the 4 P’s: Product, Price, Promotion and Place.
   a) **Product**
      (1) Explain the benefits of Mended Hearts that can offer patients.
      (2) Know the value of a visiting program.
      (3) Value of Peer visiting program
      (4) Present an overview of MHI organization
      (5) Use the online Presentation to Hospitals
      (6) Review the Benefits of starting a Chapter in officer’s portal.
      (7) Share introduction video (Recovery of Hope – Heidi’s story) and Mended Hearts overview in PowerPoint.
      (8) Distribute general MHI items, i.e. Gift of Hope, membership enrollment forms, chapter communications and newsletters
   b) **Price** — Be prepared to answer what Mended Hearts will cost a hospital.
      (1) Direct Costs — meeting refreshments, newsletter preparation and/or parking fees.
      (2) Indirect Costs — meeting room space, office space for visiting resources, and hospital liaison.
      (3) Review the value of Mended Hearts volunteer services
   c) **Promotion**
      (1) What type of advertising will be done to promote a new Mended Hearts chapter? Create joint letter from MHI and hospital head personnel (CV services) to past years of heart patients about the forming group
      (2) Will the hospital need to devote any public relations resources to Mended Hearts?
   d) **Place** — How much space does Mended Hearts require?

3. Follow up with a thank-you note after the meeting. Follow up with a telephone call within two weeks.

D. **Presentation To Potential Members (Patients & Families)**

1. Ask the hospital to send a jointly signed letter (MHI and hospital personnel, i.e. chief of cardiology) to prospective members using the hospital's database of heart patients discharged in past two years.

2. Coordinate the introduction meeting with the hospital. Arrange for a meeting room for the presentation and refreshments.

3. Presentation should include:
   a) Purpose for organizing chapter or satellite
   b) Assistance hospital will provide
   c) History of MHI and its impact on heart disease patients and families.
   d) Show orientation video.
4. Provide audience with MHI brochures, HeartGuide and membership enrollment forms.
SECTION IV

ORGANIZING NEW CHAPTERS

A. General
Each RD/ARD has primary responsibility for the formation of new chapters within his or her area. RD’s and ARD’s should review the Mended Hearts, Inc. Organization Manual and be familiar with the process for organizing a chapter. Visit the secure Officers Login section on The Mended Hearts website. You will find many downloadable templates, forms and manuals for your use.

B. Handling Inquiries
1. New chapter inquiries should be handled in a timely manner. A timely response could mean the difference between success and failure. RD’s/ARD’s should be friendly, helpful, positive and informative.

2. The RD should make the initial response to the inquiry. If a chapter is feasible, the RD should correspond with the inquiring entity and, where applicable, assign an ARD to handle the organization process.

3. Send a cover letter and a peer-to-peer/chapter start up folder. The folder should include the following inserted:
   a) Introduction letter from national staff
   b) Marketing tri-fold brochure
   c) Quantifying Value of peer-to-peer 2014 study results & fact sheet
   a) HeartGuide Visiting educational resources
   d) Heartbeat magazine sample
   e) Hospital letters of recommendation booklet
   b) Organizational profile
   c) Steps to forming a chapter
   d) Benefits to a Mended Hearts chapter
   e) Chapter petition questionnaire

4. Costs associated with organizing the chapter, such as letters to former patients, refreshments for organization meeting, etc., should be absorbed by the organizing group. They should seek donations to support these endeavors.

C. Follow-Up Steps
1. Two weeks after the initial contact has been made, the RD or ARD should contact the organizers to determine whether a new chapter is feasible and, if so, when the organizers are planning an organization meeting.

   a) Ascertain whether organizers need MHI brochures for promotion, and if so, how many brochures they will need. Typical brochures to send to organizers:
      (1) The Gift of Hope
      (2) MHI educational visiting resources
      (3) Organization of New Chapter Checklist (with RD contact info)
      (4) Charter Petition Standards
      (5) Charter Petition roster
2. Keep in contact with the organizers to determine whether key points have been met that are included on the Charter Petition Standards form. To survive more than a couple of years, the prospective chapters must have a nucleus of people they can draw from for their leaders. It is also helpful if they have the support of the nursing staff to help them with their programs and training.

3. If several months go by without a prospective chapter in sight, or if you have been unable to contact the organizers, send them a Chapter Inquiry Follow-up Letter.

D. Organizing Steps

1. When a group has reached 10 members, a charter petition to become a chapter may be submitted.

2. Determine a minimum of three chapter leaders: (Taken from forming a new Chapter)

   President
   Vice President
   Secretary/Treasurer
   As needed, Visiting Coordinator (not a chapter board position)

   a) Besides national dues, a chapter determines its own dues needed to conduct business in compliance with national policies.
   b) Determine meeting times and places convenient to members (may be in hospital, library, or other community locations.)
   c) After charter approval members receive appropriate visitor training as determined by Mended Hearts and hospital. Visitor training is mentored by the ARD and/or RD.

3. Depending on the costs involved, the RD/ARD should attend the organizational meeting for orientation and election of officers. Prior to naming the chapter, the group should be informed that the name should indicate a geographical location and include the name of the city where chapter meetings will be held.

4. Allow an extra day to meet with elected officers to go over their duties and help them get organized.

5. It is important for the RD/ARD to go over the chapter bylaws format and instruct the chapter on how to write its own bylaws. The RD/ARD should be familiar with the bylaws format and National requirements to forestall any problems. Stress early passage. (Chapter Bylaws template)

6. Set date for presentation of charter.

7. Once the process of chapter formation is complete, the chapter should begin planning its accredited visitor training. The RD or ARD should plan and facilitate the visitor training, in compliance and in coordination with the hospital procedures and hospital volunteer orientation policies. In many cases, potential visitors will need to complete hospital requirements first before the Mended Hearts accredited visitor
training program. Order appropriate MHI Accredited Visitor Training resources from the national office.

E. **Processing The Charter**

1. The RD should balance checks with member enrollment forms and follow up with organizers if they do not balance. A roster of individual and family members should be noted.

2. The RD should mail member checks, member enrollment forms, Charter Petition Standards, and Charter Petition roster to the National Office for processing.
F. Charter Members' Pins/Cards

1. The RD/ARD should inform the new chapter president of the procedure for presenting charter members their pins and membership cards – generally mailed directly to the members by the national office.

2. Send Charter form to the Field Services Director at the National Office, noting the four officer positions – president, vice-president, secretary and treasurer on the petition roster. Unless noted otherwise on the form, the National Office will mail the member lapel pins and membership letters/cards directly to the charter members. If not going directly to the members from the National Office, the RD should note who should receive the pins and member cards.

3. After the Charter Petition Standards form, Charter Petition roster and member enrollment forms/online members, are received at the National Office, staff will mail the charter member letter, card and pin directly to each new charter member.

Alternative Option for pin presentation: If the RD or ARD prefers to present the pins directly to the charter member at the new chapter's charter meeting, please note this on the Charter Petition Standards form as an alternative option. If so noted, the National Office staff will mail the appropriate number of pins to the designated RD or ARD for presentation to the members at an upcoming meeting of those members listed on the Petition Standards roster. It will be the ARD or Chapter President’s responsibility to mail pins to members who are not present at the charter meeting.

G. Chapter Charter

1. Chapter charter will be sent to the Regional Director or ARD as noted on the Charter Petition form. The Charter may be presented at the chapter’s special "charter" meeting, at which time the RD or ARD is expected to provide a presentation of Mended Hearts’ history, its meaning, objectives, and expectations. A suggested script for installation of officers is also available for the RD or ARD.

2. The date on chapter charter certificate will be the date the National Office receives the IRS assigned Employee Identification Number (EIN) for the chapter.

3. A congratulatory letter of the new charter is sent by email to the new chapter president with the assigned EIN.
H. **Organizational Manuals**

Presidents and any officer of newly chartered chapters have available resources on the password-protected area in the Officer’s Portal of the Mended Hearts website.

- Power Point presentation to hospitals
- Presentation to Hospitals
- Annual Reports
- Annual Reports actuals from previous year
- Chapter and satellite registry
- RD and ARD Contacts and national contacts
- Use marketing Packet for Health fairs, from national
- MHI Administrative Manual
- Chapter Operations Manual
- Chapter Communications Manual
- Chapter Treasurer's Manual
- Chapter Bylaws online template - Should be completed within 2 months after charter
- Visitor Training Guide, Handbook & DVD
- Logo with graphic standards
- Chapter letterhead or logo template
- Officer or visitor business card template – online to customize and print by chapter
- Requisition – resources and materials ordering

All manuals remain the property of The Mended Hearts, Inc. and must be passed to successor officers if the chapter is in good standing.

I. **Training Chapter Officers/Chairs**

Duties of chapter officers are outlined in the Bylaws, Chapter Operations Manual, and Treasurer’s Manual. RD/ARD should schedule a time to meet with new officers prior to or immediately after the charter meeting to review their duties. Face-to-face is best, and due to geographic constraints regular teleconferences should be held by ARD and RD for orientation of new chapter officers and members. Job descriptions for visiting chair, visitor, and chapter officers are available online.

It is recommended that a successor, president-elect should be identified and be mentored, along with other chapter officer and committee board members.
SECTION V

MAINTAINING CHAPTERS

A. General

RD’s should assign areas of responsibility to ARDs monthly for the chapters within their specified areas. Each ARD will report to the RD monthly, or at least regularly, regarding activity in his or her assigned area.

To maintain close relationships and contacts with chapters in the region, the RD or ARD assigned to the area should visit chapters periodically and contact them regularly via e-mail and telephone. Regional teleconference calls and possibly Skype are also excellent communication methods.

Chapters should be kept informed of any upcoming National requirements such as annual reports, or reminders when reports are due. The RD/ARD should offer to help, if needed, in completing reports.

B. Anniversaries

1. RD’s are responsible for seeing that chapter anniversaries are acknowledged with certificates. The National Office staff will provide RD’s with signed certificates with chapter anniversary information.

2. Anniversaries are recognized in five-year increments.
   a) Five-year and 10-year anniversaries are acknowledged with a Certificate of Appreciation.
   b) Fifteen- and 20-year anniversaries are acknowledged with a Certificate of Commendation.
   c) Twenty-five years and up are acknowledged with a Proclamation.

D. Revoking Charters

1. There are two ways to revoke chapters’ charters.
   a) The National Board of Directors may vote to revoke the charter of a chapter for reasons outlined in the MHI National Bylaws.
   b) The chapter may notify MHI that the chapter is disbanding. Its charter will then be revoked at the next National Board of Directors meeting.

2. The Regional Director should send the chapter a letter recognizing the chapter’s intent to disband and set forth steps the chapter should follow.

The letter should include this statement:

“Chapter funds must be sent to the National Office to be held in escrow for two years." (A few chapters try to get around this policy by donating their funds to various nonprofit organizations prior to closing their bank account, or notifying the National Office that they are disbanding. The group may be more inclined to return the money to the National Office if they are told that the money will be used to help organize a new group if it is accomplished within two years.)
3. The full balance of chapter bank accounts should be sent to the national office via a cashier’s check from the bank. Bank statements/records do not have to be returned to the National Office unless the chapter received over $25,000 during the year.

4. The chapter should notify the hospital, via letter with a copy to the RD, that the chapter is disbanding and that the MHI visiting program has been discontinued.

5. The chapter should return all MHI manuals and MHI visiting resources, including visiting handbooks and other visitor training manuals, guides and DVDs to the RD.

E. **Chapter Suspensions/Disbandment’s**

Chapters are placed on suspension when the chapter programs are failing, but there is interest in reorganizing. Chapters are placed on suspension for several reasons. The most common ones are:

1. They fail to elect officers for the coming year.
2. The President resigns and no member will assume the duties.
3. More than one officer resigns and no members will assume the duties.
4. The visiting program is failing; lack of trained visitors.
5. Membership has declined to only a few inactive members.

F. **Chapter Suspensions--Reorganizing**

1. The RD/ARD should meet with a core group of members to set specific goals for reorganizing. Letters should be written to the hospital(s) where the chapter visits, requesting support in the reorganization effort.

2. Contact the hospital and ask them to refer heart patients to the chapter. Identify Hospital contacts and continue to follow up for possible new members. IE: Charge nurse Cardio nurse, rehab nurse. Members who are accredited visitors and encourage them to make follow-up phone calls to heart patients visited in the hospital, after discharged (for those patients that granted permission to be contacted after hospital discharge.)

3. Encourage members to renew their memberships and try to obtain new members. It is up to the Regional Director to place a chapter on suspension. Chapters should be suspended for no more than one year from the date of the annual Board of Directors meeting.

4. The RD is to notify, in writing, the Field Services Director at the National Office, about the status of the chapter.
G. **Satellites**

1. Chapters can now be formed with 10 members. Chapters are preferred over Satellites.

2. Types & Definitions of Satellites
   a) **Host Chapter**: A chartered chapter that authorizes members to meet and conduct programs under its auspices, generally in a different geographic location.
   
   b) **Interim Satellite**: A group of host chapter members authorized to meet separately and conduct programs pending the formation of a new chapter.
   
   c) **Program Satellite**: A group of host chapter members living distant from the chapter's regular meeting location, who are authorized to meet separately and conduct programs for extended periods of time because forming a new chapter is impractical, e.g., no hospital or home visiting opportunities are available.

3. When a host chapter recognizes the need for a satellite, the chapter president appoints, from among the satellite group, a coordinator to act as a representative, either a hospital liaison or patient coordinator. In all matters, satellites are subject to the administrative jurisdiction of host chapters.

4. Satellite participants are members of the host chapter and may participate in all chapter activities. Satellites are not chartered, and do not have elected officers.

5. Satellites may receive financial assistance from their host chapter to conduct their monthly meetings and programs. Satellite members have same dues structure as host chapter. There shall be no separate or additional assessment of dues to satellite members. The host chapter may allocate chapter funds to the satellite, as with any other chapter board-approved budgeted items. When additional costs are involved, the satellite or host chapter may conduct fund-raising projects to offset costs. All funds raised by the satellite and host chapter are governed by MHI policies and guidelines and must be reported on the host chapter annual chapter financial report. See the Chapter Treasurer's Manual for fund-raising guidelines.

   **IMPORTANT:**
   - Satellites CANNOT have a Federal EIN
   - Satellites CANNOT have a treasurer
   - Satellites CANNOT have a bank account

6. Satellites may have separate visiting programs at different institutions and a member from the satellite may act as a coordinator of visiting, but supervising, training and accrediting visitors is under the jurisdiction of the host chapter.

7. If a satellite requests chapter status (grows to appropriate number of members and elect’s officers), the required MHI charter petition documents must be completed and submitted to the Regional Director, and onto the national office. An interim satellite must meet the usual conditions and standards. Members in good standing will be transferred to the new chapter with their existing membership expiration dates. At the discretion of the host chapter, a portion of the host chapter dues may be allocated to the new chapter to help with chapter startup. Host chapters also determine whether a portion of satellite members’ dues will be donated to the group if a new chapter is formed from a satellite.
Section VI

Cluster Meetings

A. Cluster Meetings (multiple chapters’ members gathering) should be considered to share best practices among chapters and encourage further peer-to-peer connections. The Regional Connections have advantages such as:

- Interaction with chapter members from around the region
- Flexible agenda
- Little to no expense
- Members from multiple chapters/areas gather to brainstorm ideas and best practices
- Participate in additional member training to continue with Mended Hearts mission

B. In remote areas, Cluster meetings should be considered to gather together widely separated chapters, either electronically, or face-to-face. The minimum attendance should be at least three chapters. Chapter officers, committee chairman, as well as potential chapter leaders are the intended audience. All members may attend. Scheduled dates for Regional Connections must be approved by the regional director. Other regional directors and national officers should be notified of the dates.

C. Suggested topics:

1. Awareness – MH Overview PPT or Visiting video
   a) Presentation skills & Communicating your story

2. Visiting topics
   a) Visitor reaccreditation training – challenging situations and solutions
   b) Recruiting visitors
   c) Active listening skills; being “present” with the patient and family
   d) Strengthening visitor accreditation training program
   e) Conducting follow-up visits – phone and email, cardiac rehab classes
   f) Why Internet Visiting is important?
   g) Privacy and confidentiality reminders - Health Insurance Portability and Accountability Act (HIPAA)
   h) Team visiting - Caregivers as trained accredited visitors to accompany heart survivors to visit families

3. Chapter Operations topics
   a) How to run a meeting – conducting interesting and fun meetings
   b) Working as a Team
   c) Communicating effectively; modes of communications
   d) Mentoring successive officers and managing the leadership transition
   e) Ways to increase program attendance
   f) Engaging chapter programs
   g) How to engage new members, and reach diverse members
   h) Why members should attend a Regional Connections or national conference
i) Marketing your chapter - social media, community events, hospitals and cardiologists
j) Nonprofit financial management – revenue and expenses and monthly tracking.
k) Tracking finances and visiting for annual chapter reports to MHI
l) Raise awareness by creating and maintaining chapter Web site

4. Regional Challenges
   a) Maintaining independence of MHI from healthcare organizations
   b) Defining roles of ARD and RD in helping chapters
   c) Mentoring chapter leaders to move up in organization
   d) Engaging new members of diverse backgrounds

**REGIONAL CLUSTER MEETINGS – PUBLIC SYMPOSIUMS**

A. Regional Cluster Meetings include BOTH Leadership Training for Mended Hearts / Mended Little Hearts AND a Patient and Family Symposium that is open to all members and to the public. Few events are as powerful as this one for creating educational and awareness opportunities. This event also as the potential to bring new faces to the region’s Mended Hearts / Mended Little Hearts chapters.

B. The Regional Cluster Meeting Toolkit is located in this manual as EXHIBIT G. The toolkit contains:
   a. A detailed logistical plan
   b. Marketing tools
   c. An event timeline
   d. Suggested agendas
   e. A meeting packing list
   f. Roles and responsibilities
   g. A sponsorship packet
   h. A sample regional meeting flyer
   i. A sample Save the Date postcard
Section VII

PROCESSING TRAVEL EXPENSES AND REIMBURSEMENT

This page will be updated
**EXHIBITS**

<table>
<thead>
<tr>
<th>EXHIBIT</th>
<th>TITLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>A.</td>
<td>Chapter Forming letter to potential patients with hospital</td>
</tr>
<tr>
<td>B.</td>
<td>New Chapter Checklist</td>
</tr>
<tr>
<td>C.</td>
<td>Use Officer portal: Presentation to hospital, Presentation for Heart Health support, Starting a chapter, Mended Hearts Business cards. Template for awards.</td>
</tr>
<tr>
<td>D.</td>
<td>Chapter Charter Petition Standards</td>
</tr>
<tr>
<td>E.</td>
<td>Chapter Charter Petition Roster (list of members &amp; four officers)</td>
</tr>
<tr>
<td>F.</td>
<td>Chapter Inquiry follow-up template letter</td>
</tr>
<tr>
<td>G.</td>
<td>Regional Cluster Meeting Toolkit</td>
</tr>
<tr>
<td>H.</td>
<td>Regional Connections Written Evaluation Form</td>
</tr>
</tbody>
</table>
Sample letter to heart patients/families – Mended Hearts organizational meeting and forming chapter - Hospital and MH member/leader

Dear Heart patient and family,

Our hospital is helping to starting a new Mended Hearts chapter to meet at ___________________. As a heart patient or caregiver, we are inviting you to an informational meeting to learn more about Mended Hearts and its services to support heart patients in their recovery through peer to peer support. Mended Hearts has been offering the gift of hope to heart patients, their families and caregivers for over 60 years. Recognized for its role in facilitating a positive patient-care experience, Mended Hearts partners with about 450 hospitals and rehabilitation clinics across the country and offers services to heart patients through visiting programs, support group meetings and educational forums. Mended Hearts mission is “inspiring hope and improving the quality of life for heart patients and their families through ongoing peer-to-peer support.”

Because Mended Hearts is made up of the very kinds of people it serves – heart patients, their families, and others impacted by heart disease, its members draw on personal experience as they help others. Mended Hearts support groups help people understand that there can be a rich, rewarding life after a heart event. Members listen, share their experiences, learn from healthcare professionals and volunteer to talk to other heart patients about what they may face including lifestyle changes, depression, recovery, and treatment. Annually, Mended Hearts volunteers make an average 200,000 visits to patients and families in hospitals, online and by phone.

Mended Hearts hosts an annual training and education conference for members and provides many networking opportunities. The national office also publishes a quarterly magazine, Heartbeat, to communicate valuable information, chapter news and inspirational stories and is mailed to all members’ homes.

We invite you to join Mended Hearts and hear more about Mended Hearts support services by attending an informational meeting:
Who is invited: 
Where: 
When: 
Why: to learn about Mended Hearts and join

For further information or questions, please contact _____ at phone: ________________

Best regards,

Co-signed

______________________________
Mended Hearts Regional Director

and

______________________________
Hospital staff – i.e. cardiologist, cardiovascular services, marketing or volunteer director
Complete items listed below and send to:

________________________________

________________________________

________________________________

<table>
<thead>
<tr>
<th>CHECK WHEN COMPLETE</th>
<th>ITEM/INSTRUCTIONS</th>
</tr>
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<tbody>
<tr>
<td>✗ Chapter Charter Petition Standards – Complete form to best of ability</td>
<td></td>
</tr>
<tr>
<td>✗ Attachment – Provide names of 4 elected officers at minimum.</td>
<td></td>
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<tr>
<td>✗ Chapter Charter Petition – Every member who joins MHI must complete a membership enrollment (online or paper) and be listed on this form, or attach roster. These members will become charter members.</td>
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<tr>
<td>✗ Membership Enrollment Forms/Online – Persons interested in becoming members should complete a membership enrollment and pay national and chapter dues. Indicate membership type for each charter member: individual, family or life members.</td>
<td></td>
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</tbody>
</table>
Use officer portal to view and download
Presentation to hospital, Presentation for Heart Health support, Starting a chapter,
Mended Hearts Business cards, Template for awards.
CHAPTER CHARTER PETITION STANDARDS
Rev. March 2016

Proposed Chapter Name: _______________________________________________________
Chapters may create and suggest a unique name that is recognizable in the state, region, county or community. Examples: Mended Hearts of the Pee Dee region; Mended Hearts of Sangamon County, Mended Hearts of Birmingham

Note: Chapter name must not match a hospital name as multiple health systems may be served by the future chapter.

Primary city or locality served: __________________________________________________
The city where the chapter meets will be designated as the location of the chapter. This designation will appear on all documents published at the national level.

State of: ___________________________________________________________________

Charter date to correspond with IRS EIN obtained date: ____________________________

A. Number of charter memberships: (minimum of 10 members required) – attach chapter roster of member names and/or member enrollment forms for each (if not completed online)
   1. Individual ________________
   2. Family ________________
   3. Indicate on roster if already a Mended Hearts satellite member

B. Hospital(s) performing coronary surgeries and cardiac procedures:
   Hospital Name/Location _______________________________________________________
   _____________________________________________________________
   _____________________________________________________________

C. Type of procedures / surgery / heart care: Indicate Yes or No and approximate number of cases/day
   1. Open Heart (valve & CABG) Now?________ # cases/day _________________
   2. Coronary Catheterization Now?________ # cases/day_________________
   3. Stents & Angioplasty Now?________ # cases/day________________
   4. Heart Transplant/LVAD Now?________ # cases/day_______________
   5. Children’s Surgery Now?________ # cases/day_______________
   6. Other:__________________________________________________________________
D. Written or verbal commitment for MH visiting privileges with heart patients from:
1. Cardiovascular Services  ☐ Yes  ☐ No
2. Cardiologists  ☐ Yes  ☐ No
3. Volunteer Services Dept.  ☐ Yes  ☐ No
4. Cardiac Rehabilitation  ☐ Yes  ☐ No

E. The hospital will provide the following support services:
☐ Office space  ☐ Courtesy parking  ☐ Food service  ☐ Discounts
☐ Telephone  ☐ Identification badges  ☐ MH on hospital website  ☐ Other

F. What organization will provide the following in-kind services:
☐ Office space  ☐ Telephone usage  ☐ Annual grant  ☐ Newsletter printing
☐ Newsletter distribution  ☐ Newsletter editing  ☐ Newsletter mailing  ☐ Label maintenance
☐ Other  Organization’s name: ____________________________________________

G. Names of three officers/leaders & position title:
1) __________________________________________________________
2) __________________________________________________________
3) __________________________________________________________
Optional: ______________________________________________________

H. What, if any, will be chapter dues?  ☐ Yes  ☐ No
If so, what are dollar amounts of chapter dues: Individual: $_________  Family: $_________
This is in addition to national annual or lifetime dues

Signed: ____________________________________________ Date: ________________
(Chapter President)

Signed: ____________________________________________ Date: ________________
(Asst. Regional Director and/or Regional Director)

........................................................................................................................................

RD or ARD USE ONLY. Please designate to whom the charter plaque should be mailed.

Send charter certificate/plaque to: _________________________________________________
_____________________________________________________________________________
_____________________________________________________________________________
**CHAPTER CHARTER PETITION**

The undersigned, being members in good standing of The Mended Hearts, Inc., and desiring to institute an accredited chapter thereof, hereby petition for a Chapter Charter.

<table>
<thead>
<tr>
<th>Name</th>
<th>Address</th>
<th>City</th>
<th>State</th>
<th>ZIP</th>
<th>Email Address</th>
<th>Amt. Paid</th>
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**Name and address of elected or acting President**

Name
Street
City State ZIP
Phone
E-mail Address

Please attach note the officers (president, vice-president, secretary, treasurer) with an *.

Section below to be filled out by MHI National Office

Accepted this ______ day of __________________, 20 ___ by: ___________________

Chapter number assigned: ____________

*National dues paid or checks attached

Mended Hearts National Office
Forming support groups - Follow-up if necessary!

Date

Name
Address or email
City, State, Zip

Dear __________, 

This is to follow up on the Mended Hearts organizational resources sent to you in anticipation of forming a Mended Hearts chapter or satellite in your area.

I sincerely hope that your efforts are going well. I’d like to meet with you and other hospital staff to discuss and schedule an organizational or introduction meeting for heart patients at the hospital. I wanted to make sure that you will contact me for questions.

I look forward to hearing from you soon. I can be reached at phone ________ or email ______________

Best regards,

Name
(Region) Regional Director

c: MHI Vice President

c: MHI Field Services Director
Regional Cluster Meeting Toolkit

Empower, Educate, Inspire

2019

Regional Meetings

Empowering heart disease patients across the lifespan.

www.mendedhearts.org
www.mendedlittlehearts.org
1-888-HEART99
This Regional Cluster Meeting includes BOTH Leadership Training for MH and MLH leaders AND a Patient and Family Symposium that is open to all members and to the public.

We know that planning a meeting of this caliber takes a lot of preparation and planning, but we are here to help you so it can be incredibly successful. This toolkit contains all the information you will need to plan, organize, and market your event.

The Regional Cluster Meeting Toolkit for this RD/ARD manual contains:

- A detailed logistical plan
- Marketing tools
- An event timeline
- Suggested agendas
- A meeting packing list
- Roles and responsibilities
- Sponsorship ideas

Additional materials and resources are available through the National Resource Center and in a separate comprehensive notebook, Regional Cluster Meeting Toolkit, provided to all RDs and ARDs.

Please know that we are here to help every step of the way. If you have questions or concerns, please contact Judy Himes at judy.himes@mendedhearts.org or 214-224-0817.

Heartfully,
Mended Hearts and Mended Little Hearts National Resource Team
Creating Your Regional Cluster Meeting Team
A Regional Cluster Meeting is a big event, and no one can do this alone. It takes a team of committed people to put on a successful event. Find out who in your Mended Hearts and Mended Little Hearts chapters might want to help and recruit people outside of your chapters who might volunteer for this event as well. Asking people personally to help, rather than sending an email to the entire chapter, goes a long way and makes them feel valued. Once you put your team together, set up your first meeting quickly to decide together all the details described below.

Event Date
The first things that need to be done after picking your team when planning a Regional Cluster Meeting are setting a date and picking an event location. We recommend reserving a location at least three months in advance. When choosing a date, it’s important to pick a weekend that there are no other large events going on (a Google search can be helpful). You should also take into consideration your geographic area and weather. If you live in a cold, snowy location, find a date where you are not likely to get snowed out or when there may be poor driving conditions.

Event Location
There are a number of factors to take into account when considering location. Consider the locations’ convenience to large groups of people, how much parking it has, venue cost, and access to public transportation. The space also needs to be able to accommodate the amount of people you expect to attend. A local hospital may offer meeting space at no cost or very little cost. (They may offer to cover some food as well.) Alternatively, you may have a relationship with organizations aside from your local hospital that may be willing to host your event at little-to-no cost. You will want to be sure that AV is available in the space you find and determine potential cost for AV. (It can get pricey.) In addition, be sure to go see potential meeting space to ensure there is good visibility to the speakers and enough room for participants to interact with each other. In addition, you will need hallway space or other space for registration and sponsors (and vendors, if desired).

Insurance Issues
Be sure to check with your chosen venue and determine what insurance information is necessary. You may need additional insurance coverage for your event, so determine if that is the case. The National Resource Center can help you obtain insurance through our carrier.

Registration
There are different ways to manage registration:
• Our National Resource Center will set up registration for you, if you would like online registration. We will use Constant Contact as we do for other conferences.

• You can do your own registration online. If you chose to do your own online registration, please plan it carefully. Make sure you know who will be keeping track of registrations and communicating with registrants. You will also need some way of collecting registration fees and keeping track of them as well.

• If you want to register people in person at the event, designate the person responsible for registration and for collecting money. If you plan to take credit cards, you will need a device to read them at the event. If you choose to do this, you may not have a good idea as to how many people might show up, so it is not ideal for planning meals and conference materials.

We are suggesting a $25-$35 registration fee to cover meals, AV and printing. Also, when people pay to attend events, they are more likely to show up.

With online registrations, you will be able to create registration packets to give to people when they get there. It is always a good idea to collect information so you can thank people for coming after the event as well.

**Merchandise**

If you decide to have conference folders, bags, t-shirts and/or other items that you will give out or for purchase, you will want to plan that ahead of time. Some organizations may donate or sponsor meeting bags with their logo on them and other items to put into the bags if you ask them.

If you are ordering items to give out or sell, find a good vendor, get pricing, and find out how long it will take for the item(s) to arrive. Give yourself a little extra time to get items in. Please get all t-shirt designs approved by MH and MLH national, and we are glad to help you design your shirt as well.

You might also choose to sell some merchandise like t-shirts, water bottles, blankets, etc. at the event. This is a good way to make some extra money. You will want to be sure you have someone to work the table and sell these items and that you have money in your budget for them. You will also want to be sure to have a sign listing the items and the costs and a way to take payment, like a credit card machine (they make them for your phone) and cash box (with cash in there to make change). If you want to take credit card payments, you will need to look into options for that far in advance.

If you will have conference bags, be sure to include MH and MLH brochures, info about the chapters in the area, postcards about Bravery Bags (if applicable), handouts, and anything else conference attendees may need. Chapters may choose to purchase fun items like heart-shaped ice packs, cute MH or MLH pens, etc. to get the MH & MLH logo out there and to enhance the meeting bags.

**Food and Entertainment**

You may want to provide food and/or refreshments Friday evening and for Saturday lunch. This can range from no cost (donated) or be quite costly. Again, you might choose to cover this cost with registration fees.

You may choose to have a reception or dinner after the Leadership Training portion on Friday afternoon. This would allow Mended Hearts and Mended Little Hearts
members a chance to mingle and get to know one another. A reception might include music and fun activities as well.

On Saturday, you will want to plan to provide lunch for participants. If your budget allows, you might also provide coffee and/or breakfast in the morning when participants get there. (Note: if you are not providing breakfast, please be sure to start a little later so people have time to have breakfast before the event.) During both Leadership Training and the Patient and Family Symposium on Saturday, please be sure to provide water for participants. You might also choose to purchase mints or other items to put at tables. **Please always be aware of possible food allergies.**
<table>
<thead>
<tr>
<th>Time</th>
<th>Organizational Task</th>
<th>Marketing Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>3 months before</td>
<td>___ Create Conference Team</td>
<td>___ Send out Save the Date</td>
</tr>
<tr>
<td></td>
<td>___ Hold first meeting</td>
<td>___ Announce on social Media</td>
</tr>
<tr>
<td></td>
<td>___ Reserve location</td>
<td>___ Create event on FB, Twitter, Instagram</td>
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<tr>
<td></td>
<td>___ Set date</td>
<td>___ Add logo and event to your group’s website</td>
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<tr>
<td></td>
<td>___ Create online registration</td>
<td>___ Promote on social media twice a month</td>
</tr>
<tr>
<td></td>
<td>___ Create budget</td>
<td>___ Put postcards &amp; flyers in strategic locations</td>
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<tr>
<td></td>
<td>___ Create agenda</td>
<td></td>
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<tr>
<td></td>
<td>___ Check insurance</td>
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<tr>
<td></td>
<td>___ Approach hospitals and companies for sponsorship</td>
<td></td>
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<tr>
<td></td>
<td>___ Start volunteer recruiting</td>
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<tr>
<td></td>
<td>___ Identify speakers</td>
<td></td>
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<tr>
<td>2 months before</td>
<td>___ Plan meals &amp; make arrangements</td>
<td>___ Promote on social media once a week</td>
</tr>
<tr>
<td></td>
<td>___ Reserve entertainment</td>
<td>___ Continue to put out flyers</td>
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<tr>
<td></td>
<td>___ Continue to get sponsors</td>
<td>___ Contact local radio/news</td>
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<tr>
<td></td>
<td>___ Order banners and signs</td>
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<td></td>
<td>___ Order plaques for any awards or main sponsors</td>
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</tr>
<tr>
<td></td>
<td>___ Order t-shirts, bags &amp; merchandise</td>
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<tr>
<td>1 month before</td>
<td>___ Create volunteer schedule</td>
<td>___ Send out press release to local media</td>
</tr>
<tr>
<td></td>
<td>___ Set event day schedule</td>
<td>___ Promote on social media twice a week</td>
</tr>
<tr>
<td></td>
<td>___ Confirm all speakers, music, and meals</td>
<td>___ Promote on MH &amp; MLH National social media</td>
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<tr>
<td>2 weeks before</td>
<td>___ Go over volunteer schedule with volunteer lead</td>
<td>___ Promote on social media Three times a week</td>
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<td></td>
<td>___ Prepare meeting bags</td>
<td>(be sure to mention sponsors)</td>
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<tr>
<td></td>
<td>___ Send email to volunteers</td>
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<tr>
<td>Day before</td>
<td>___ Print registration forms</td>
<td>___ Post on local and national social media sites</td>
</tr>
<tr>
<td></td>
<td>___ Print waivers for photos</td>
<td></td>
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<tr>
<td></td>
<td>___ Print registration lists</td>
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<td></td>
<td>___ Pick up credit card device</td>
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<td></td>
<td>___ Pick up donated food and beverage items</td>
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<tr>
<td>Time</td>
<td>Organizational Task</td>
<td>Marketing Task</td>
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<tr>
<td></td>
<td>___ Walk through conference</td>
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<td>___ Put up signs, if possible</td>
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<td></td>
<td>___ Put any new bags together</td>
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<tr>
<td>Day of</td>
<td>(See Day of Schedule)</td>
<td>____ Assigned people to post videos and pictures on social media throughout event</td>
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<td></td>
<td>____ Assigned people to post videos and pictures on social media throughout event</td>
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<tr>
<td>Very soon after</td>
<td>___ Thank volunteers via email</td>
<td>____ Post on social media thanking main sponsors again and thanking all who came to the meeting</td>
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<tr>
<td>meeting</td>
<td>___ Thank conference attendees via email— include details and a picture</td>
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<td></td>
<td>___ Thank all major sponsors with a thank-you note</td>
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<td>___ Deposit all checks</td>
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<td>___ Generate reports of</td>
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<td>______ Meeting proceedings</td>
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<td>___ Hold debrief meeting</td>
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Budgeting
It is important to set your budget early in the planning stages. There are many possible costs that should be taken into consideration. You may be able to get many things donated or at a discount (don’t forget to ask). Here are some costs you may need to consider:

- Fees for the venue
- Extra insurance fees, if needed
- Marketing materials (printing costs, signs)
- Food
- Water bottles or coolers
- Conference bags, items to go in bags, and folders for handouts
- T-shirts and other merchandise
- Speaker travel costs, if any
- Plaques or gifts for top sponsors and/or hospital sponsor or chapter awards
- Miscellaneous items like speaker/main volunteer gifts, snacks, etc.

Sponsorships
Your conference costs can be completely covered by sponsorships, so start early to create a plan to get sponsorships. MH and MLH National is glad to help you with this plan. We have created a customizable local sponsorship packet (included in this toolkit) for you already and are happy to work with you on this.

Start by making a list of all of your chapters’ contacts and go talk to as many of them personally as you can (form on following page). You will be surprised at how many are willing to do something, even if it’s small or an in-kind donation. If they say “no,” thank them and ask if they know anyone who might be interested in sponsoring or if they could provide volunteers for the event.

The hospital you work with and cardiology practices should always be contacted for sponsorship. It gives them a huge amount of positive publicity to be associated with your event.

Also, there are stores like Kohl’s and Target that will provide volunteers and a sponsorship if you fill out the right forms (Kohl’s has a new online portal called Benevity). Finally, grocery stores, Costco, Sams Club, etc. are often willing to provide gift cards or in-kind donations of food and other things you may need.
## POTENTIAL SPONSORS

<table>
<thead>
<tr>
<th>Company</th>
<th>Contact</th>
<th>Request Amount</th>
<th>Who Will Contact?</th>
<th>Date Contacted</th>
<th>Response Y/N</th>
<th>In Kind Donation Of</th>
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MARKETING AND PROMOTION

Marketing and promoting your Regional Cluster Meeting will be important for ensuring its success. There are many ways and places to market your meeting.

- Hospitals—The hospital marketing teams (for all hospitals in the area) may be willing to market the Regional Cluster Meeting using their marketing channels and allow flyers in their waiting rooms and other high-traffic places.
- Healthcare Organizations—Other healthcare organizations, such as cardiac rehab centers, local gyms, pharmacies, and other such places might be willing to put up flyers or give out information about your event.
- Local Media—Your local TV station or radio station might be willing to promote your event and even do an interview about your event on air. Local newspapers and publications might be willing to include something about your event as well. Some papers will put information in the Health section on the calendar at no cost.
- Social Media--Be sure to take full advantage of all your social media networks. Create an event on Facebook, Twitter and Instagram with a link to the registration page. Contact Mended Hearts Mended Little Hearts National and ask us to share and promote on our national pages. If your chapter has a website be sure to add the logo and a link to the event.
- Emails—Send out emails to members about the event and ask them to share the information. Maybe even create a video about the event to share.
- Use contacts-- Don’t be afraid to take advantage of all your connections in the community to get the word out about the event. Print flyers to put in doctors’ offices, libraries, local gyms, and schools.

No matter how you choose to promote the Regional Cluster Meeting, be sure to use the Regional Cluster Meeting graphic that we have provided to you. We can customize the graphic with your community name and event date and will customize postcards, posters and flyers for you as well.
VOLUNTEERS

One of the most important parts of executing any big event is having an adequate number of volunteers. Below is a list of volunteer positions you may need and approximately how many of each you will need. (Note: You will want to get MORE volunteers than you need as some may fail to show on Regional Meeting day.) After you have determined how many volunteers you will need, it’s time to figure out where to get them. You can ask people in your local chapters and hospitals. There are sites like Volunteer Match where you can ask for volunteers for specific events. Ask your members to check with their organizations and churches to see if they can gather volunteers for you. Kohl’s has supported several our chapters in the past by providing volunteers and sponsorship. Don’t be afraid to keep asking. It’s a great event.

Depending on how many volunteers are needed, you may want to use a volunteer platform like SignupGenius or a similar one to organize volunteer positions and send reminders.

Here are positions that will need to be filled by volunteers:

- Set-Up
- Registration table (6)
- Walk-up registration (3)
- Volunteer check in (2)
- Vendor check in (1)
- Merchandise table (2)
- Floaters (4)—monitor room temperature, notify someone of AV issues, manage meals/food, etc.
- Speaker Support (1-2)
- National Anthem
- Photographer and Specific Volunteers
- Break Down & Packing Up
## VOLUNTEER POSITIONS WITH DESCRIPTIONS

<table>
<thead>
<tr>
<th>Volunteer Position</th>
<th>Description</th>
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<tbody>
<tr>
<td>Set-Up</td>
<td>Arrive early and set up for the meeting. This includes putting up tables, signs and banners as well as putting folders and conference bags out. It also may include setting up the registration.</td>
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<tr>
<td>Parking, if needed</td>
<td>Arrive before registration opens to help guide people to the right area to park and then guide them to conference. Get vouchers for volunteers and speakers, if possible.</td>
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<tr>
<td>Registration</td>
<td>Arrive to help set up registration. Hand out folders, handouts, bags, and any other items to participants. Make sure every participant has a name tag.</td>
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<tr>
<td>Walk-Up Registration</td>
<td>Set up walk up-registration before registration opens. Take payments for online registrations. Hand out walk-up bags and any other items. Make sure each walk-up signs a waiver.</td>
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<tr>
<td>Vendor/Exhibitor Check-In</td>
<td>Learn, in advance, where each vendor will be. Arrive early to set up vendor check in. Greet vendors as they arrive and guide them to their location. Thank them for being a vendor.</td>
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<tr>
<td>Volunteer Check-In</td>
<td>Arrive with set-up volunteers to check volunteers in as they arrive. Tell volunteers where to go (assignments should be done in advance of meeting). Make sure all volunteers know what to do. Be sure to collect emails to thank volunteers after the event.</td>
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<tr>
<td>Merchandise Volunteer</td>
<td>Arrive before registration begins. Help set out merchandise for sale. Take payment for merchandise. Keep inventory of what is left to sell. Count items left when done.</td>
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<tr>
<td>Meeting Volunteers</td>
<td>Arrive one hour before Meeting begins. Learn where bathrooms are, where parking is, and where the room is so you can guide participants to the right place. Be sure each person registers or picks up their registration materials upon arrival. Monitor room temperature, AV, and vendors/exhibitors.</td>
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<tr>
<td>Speaker Volunteers</td>
<td>Greet speakers upon arrival. Ensure speaker has all he or she needs. If speaker is bringing slides, ensure slides get to the person in charge of AV. If available, get parking voucher for speaker.</td>
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<tr>
<td>Specific Volunteers &amp; Floaters</td>
<td>Specific volunteers (ex. photographer, food servers, DJ for reception, etc.) will have assignments specific to what they have offered to do. Floaters are volunteers who float around to different places to make sure the Meeting is running smoothly and to help where needed. Floaters should arrive before registration begins.</td>
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## CONTACT INFORMATION FOR EVENT

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<tr>
<th>Area (ex. Food, A/V)</th>
<th>Contact Name</th>
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REGIONAL CLUSTER MEETING-DAY LOGISTICS

Packing List for Meeting Day

- Signs and Banners
- Small signs with letters for registration (i.e., A-D, E-H, etc.)
- Duct tape
- Scissors
- Markers and pens
- Tables
- Something to cover tables
- Conference folders and bags, if applicable
- Name tags
- Registration list
- Volunteer list
- Volunteer name tags
- Registrant name tags
- Devices to accept credit cards
- Cash box with lock
- Cash
- Coffee and food for volunteers (pick up morning of)
- First aid kits (2)
- Water and snacks
- Paper cups, plates, silverware, if needed
- AV
- Merchandise to sell, if applicable
- Sign for merchandise
- Food for any meals being served
- Brochures and materials to put out or put in bags
- Parking vouchers for speakers, if possible
- Speaker List with contact info

Registration table
If you provide an opportunity to sign up online before the Regional Meeting, you will want to close the registration the night before at the latest. You can determine if you will allow walk-up registrations. If so, you may want a separate walk-up registration table.
You will want to have some type of remote credit card system to accommodate walk-up registrants who do not have cash. It's also good to have this in case you want to sell merchandise. Be sure to have waivers on hand at the registration table and back up registration forms.
Sample Schedule

Friday Afternoon, Leadership Training for MH & MLH Leaders
12:30 p.m.
  • Chapter leaders and set-up volunteers arrive
  • Set up for meeting, merchandise and registration

1:30 p.m.
  • Registration table opens
  • Merchandise table opens

2:00 – 5:00 p.m.
  • Leadership Training begins

5:15 p.m.
  • Optional Reception
  • Clean Up

Saturday, Patient Symposium, Open to Public
8:00 a.m.
  • Set up for patient Symposium

8:30 a.m.
  • Registration table opens
  • Merchandise table opens

9:00 a.m. – 12:00 p.m.
  • Patient Symposium—Morning Sessions

12:00 – 1:00 p.m.
  • Lunch

1:00 – 4:00 p.m.
  • Patient Symposium—Afternoon Sessions

4:30 p.m.
  • Clean up and pack up
Sample Agenda

Friday Afternoon
2:00 p.m.
• Welcome MH & MLH Leaders

2:15 p.m.
• Growing Membership and Increasing Volunteerism

2:45 p.m.
• Sharing Our Story

3:15 p.m.
• Break

3:30 p.m.
• The Power of Peer Support—Different Ways We Can Help Patients & Families

4:15 p.m.
• Hospital/Cardiology Office Programs

4:45 p.m.
• Closing

5:00 p.m.
• Adjourn

5:15 p.m.
• Optional Reception

Saturday
9:00 a.m.
• Welcome
  • Keynote Inspirational Speaker

9:30 a.m.
• Peer Support Programs—Success Stories

10:00 a.m.
• Communicating with Medical Professionals to Make Better Informed Decisions

10:30 a.m.
• Break

11:00 a.m.
• Outside of the OR--Valve Disease Treatments of Today

11:30 a.m.
• Heart Failure—What It Means and Treatment

12:00 – 1:00 p.m.
• Lunch

1:00 p.m.
• How To Use Technology to Find Health Information

1:30 p.m.
• Imaging and Monitoring Heart Patients of All Ages—What’s New?
2:00 p.m. Breakout Sessions
1. Diabetes and Heart Disease
2. CHD Treatment Innovations

2:45 p.m.
• Break

3:15 p.m. Breakout Sessions
1. Heart Disease Topic
2. CHD Topic

3:50 p.m.
• Close

4:00 p.m.
• Adjourn
City name - Date – Mended Hearts and Mended Little Hearts will be hosting a Patient and Family Symposium for patients with heart disease of all ages and their families on (date) as part of their Regional Cluster Meeting.

This Saturday event will focus on empowering, educating and informing heart patients, caregivers, and family members who want to learn more about the impact of heart disease on adults and children. Medical professionals interested in the patient perspective are also encouraged to attend, as the symposium will highlight the power of shared decision-making and the importance of the patient voice.

"I am truly excited that we are able to bring the Patient and Family Symposium to (insert community name)” said Donnette Smith, President of Mended Hearts. “Not only will participants be exposed to the latest in cardiac innovation; they’ll learn how they can become advocates for themselves and their loved ones in the health care system.”

Sessions will focus on patient care, innovations in health care, informed decision-making, the power of peer support, and more. The Patient and Family Symposium will be held on (insert dates) from (insert times) at (insert address). To register, please contact (insert name and contact info).

About Mended Hearts and Mended Little Hearts:
Mended Hearts is the largest heart patient support network in the world, with 18,000 members and 200 chapters. Recognized for its role in facilitating a positive patient-care experience, Mended Hearts partners with hospitals and cardiac rehab clinics to offer support through visiting programs, group meetings and educational forums. Mended Hearts inspires hope and improves quality of life for heart patients and their families through ongoing peer-to-peer support. Mended Hearts of (insert name) was formed in (insert date) to help support patients and families in the (insert name of community) community.

Mended Little Hearts plays a significant role in the lives of families with children diagnosed with CHDs. Through its local support group meetings, health education to communities, hospital support programs, disease awareness activities, and advocacy on issues that affect our families, Mended Little Hearts provides hope, help and healing so families can be families and kids can be kids. Mended Little Hearts is a program of The Mended Hearts Inc. Mended Little Hearts of (insert name) was formed in (insert date) to help support families in the (insert name of community) community.

For more information please contact ________________________.