About this Manual

There is always a balance between being too rigid so that leaders feel micro-managed and stifled and being too loose resulting in no consistency and a lack of policies to help guide leaders and resolve problems. MH and MLH has always tried to allow its chapters the ability to customize support in a way that is right for their area and/or hospitals while still maintaining national standards that help with consistency and professionalism. This Manual, hopefully, reflects that balance.

As always, MH and MLH leaders may ask questions and give feedback about policies—we don’t ever assume to have all the answers. There may be things that we didn’t consider and need to add or things that need to be altered. Bear in mind that MH and MLH have a wonderful diversity in leadership, and thus leaders’ opinions about policies sometimes differ considerably. Please don’t hesitate to contact your National Resource Center with questions and feedback. We would love to hear from you.
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1 Organizational Information

1.1 About Mended Hearts

Mended Hearts is a national and community-based non-profit organization that has been offering the gift of hope to heart disease patients, their families and caregivers, since 1951.

The organization was started in the early 1950’s with the assistance of Dr. Dwight E. Harken in Boston, Massachusetts. Dr. Harken is widely acclaimed as both the father of heart surgery and the creator of the intensive care unit. In addition to these two accomplishments, he sparked four of his patients - Keith Otto, Alphonse Santomassimo, Doris Silliman and Elizabeth Wilkinson - to "start a support chapter" for other heart patients. Through their work, and his assistance, The Mended Hearts, Inc., was chartered.

From its humble beginnings in 1951, Mended Hearts has grown to one of the nation’s largest and most respected heart patient support organizations with over 21,000 members operating through 300 community-based chapters and satellites across the country. Recognized for its role in facilitating a positive patient-care experience, Mended Hearts and Mended Little Hearts partner with 460 hospitals and cardiac rehab clinics to provide patient-to-patient support through visiting programs, chapter meetings and educational forums.

The Mended Hearts organization’s mission is “to inspire hope and improve the quality of life of heart patients and their families through on-going peer-to-peer support, education, and advocacy.” Trained and accredited Mended Hearts and Mended Little Hearts visitors provide more than 200,000 visits annually to heart patients, their families and caregivers primarily in person, but also online or by phone.

The Mended Hearts Program currently offer several programs and services to assist patients, caregivers and their families:

- Local Chapter programs and support meetings
- Accredited Visiting Programs
- Educational resources such as the HeartGuide and the GoTo Guides
- Educational webinars
- Advocacy

1.2 About Mended Little Hearts

Under The Mended Hearts, Inc., there are two distinct, yet overlapping programs—the Mended Hearts Program and the Mended Little Hearts Program. Mended Little Hearts is a volunteer-based program that works nationally and in communities to empower families affected by congenital heart defects/disease through peer-to-peer support, education, hospital programs, awareness and advocacy.
In 2004, Mended Hearts local and national leader, Tita Hutchens, recognized the unique need to support children with congenital heart defects and their families. The earnest desire to provide support to the "littlest heart patients of all" led to the formation of the first two Mended Little Hearts chapters – one in Fresno, California and one in Hollywood, Florida.

By providing families and caregivers of children with heart defects and heart disease a community of support, MLH helps children, patients with CHD and their families find strength and understanding. Specifically, MLH acts as an outlet through which they can find answers, education, resources and hope.

Mended Little Hearts currently offers several programs and services to assist families:

- Local Chapter Programs
- Accredited Visiting & Parent Matching
- CHD Awareness Initiatives
- Educational Programs and Resources, including the Mended Little HeartGuide
- Bravery Bag Programs and other hospital program
- National CHD Symposium, educational webinars and other education
- Advocacy

1.3 Mission and Vision

**Official Name:** The Mended Hearts, Inc. (MHI), the Mended Hearts Program (MH) and Mended Little Hearts (MLH). Please note the italicized "Little."

**Mission:** To inspire hope and improve the quality of life of heart patients and their families through on-going peer-to-peer support, education, and advocacy.

**Vision:** To be the premier nationwide resource and peer-to-peer support network for all patients and families affected by Heart Disease across the life span.

**Educational Mission:** To provide patient and caregiver educational information covering a wide variety of life experiences across the lifespan.

**Mended Hearts Slogan:** “It’s great to be alive and help others”

**Mended Little Hearts Slogan:** “Little hearts hold big hopes” and “Hope, Help, Healing”

**MH Chapters:** Mended Heart chapters must abide by the Mended Hearts bylaws and are structured with a local board. Chapters must meet certain requirements and follow all policy and procedures that are set forth from the Board of Directors.

**MLH Chapters:** By design, many MLH chapters’ duties and responsibilities are currently structured differently from Mended Hearts chapters; however, MLH chapters must
abide by Mended Hearts Bylaws. All MLH chapters must meet certain requirements and follow all policy and procedures that are set forth from the Board of Directors.

2 Organizational Structure

2.1 Board of Directors

The Mended Hearts Board of Directors oversees the entire organization and sets the mission and vision. The members of the Board of Directors also have specific responsibilities and duties as part of their role as a board member. The Board is made up of five officers, President, Executive Vice President, Mended Little Hearts Vice President, Vice President, and Treasurer. Others who comprise the Mended Hearts Board are: Eight Regional Directors, the Past President, a representative of the Past President’s Council, the Mended Little Hearts Board Director, and three business members. The Mended Hearts Executive Director also sits on the Mended Hearts Board as an ex-officio (non-voting) member.

2.2 National Resource Center

The National Resource Center is comprised of a nation-wide staff team that provides direction and management of the organization. These leaders are responsible for setting MH and MLH’s program strategy, including setting training initiatives, managing business development goals, and maintaining key relationships. Ultimate accountability for achieving the mission and vision rests with the national staff members.

The national staff includes staff who are in the National Resource Center in Albany and remote staff:

- Executive Director
- Business Development Team
- Membership/Field Services Support Team
- Operations Team
- Communications Manager
- MLH Program Team

2.3 Standing and Ad-hoc Committees

Mended Hearts President appoints a variety of standing and ad-hoc committees. Standing committees under the Board are the Advocacy Committee, Visiting Committee, Election Committee, Bylaws Committee, and the MLH National Steering Committee. Ad-hoc committees are appointed as the need arises and is done through the President of the Board.
2.4 National Steering Committee

This National Steering Committee is comprised of Chairs representing all of the major functions of MLH. This is a working committee that sets the vision and mission for MLH programs and plans activities to fulfill this vision. Current positions on this committee are: Committee Chair/MLH VP, MLH Board Director, Awareness Chair, Marketing Chair, Social Media Chair, Advocacy Chair, Visiting Chair, Bereavement Chair, Medical Liaison, Fundraising Chair, and Immediate Past Chair. These leaders may or may not have committees that work with them. This National Steering Committee oversees strategic planning for the MLH Program.

2.5 Mended Hearts Regional Directors (RDs)

There are eight regions in Mended Hearts: Northeast, Mid-Atlantic, Southern, Central, Mid-West, Southwest, Rocky-Mountain, and Western. Each Mended Hearts Regional Director sits on the Board of Directors and has responsibilities and duties within their region. They also oversee the ARDs. These leaders work on behalf of the chapters in their region, establish new chapters and provide support for existing chapters, and represent the Board of Directors in their region.

2.6 Mended Hearts Assistant Regional Directors (ARDs)

The regional team is comprised of assistant directors (ARDs) who are under the direction of the Mended Hearts RDs. These leaders are the conduit between national and local chapters advocating on behalf of national initiatives and local needs while sharing resources and support. ARDs distribute administrative duties across the organization and provide a clear first point of contact for local chapter leaders. ARDs are also responsible for establishing new chapters and supporting existing ones.

2.7 Mended Little Hearts Regional Directors (MLH RDs)

The Mended Little Hearts regional team is comprised of regional directors who oversee the eight regions and sit on the Mended Little Hearts Steering Committee. The regional team is led by the MLH Board Director. These leaders are the conduit between national and local chapters advocating on behalf of national initiatives and local needs while sharing resources and support. MLH RDs provide a clear first point of contact for local chapter leaders.

2.8 Mended Hearts Chapters

Chapter officers lead local MH chapters. The Chapter Bylaws template, located on the Officer Portal, will assist chapter leaders in defining and implementing these officer roles. There are four mandatory officer roles: President, Vice-President, Secretary, and Treasurer. Local chapters are comprised of the individual members that provide patient and caregiver support programs. Members are patients affected by heart
disease, caregivers, hospital professionals, and others who wish to support those patients and families. Among other things, local chapters conduct education programs and activities, lead fundraising initiatives, manage the Accredited Visiting programs, and host educational, awareness and social activities for members and the community. In short, local chapters work one-on-one with patients and caregivers to fulfill MH’s mission and vision.

2.9 Mended Little Hearts Chapters

Local MLH chapters are led by chapter leaders called coordinators. There are four mandatory coordinator roles: Lead Coordinator, Educational Coordinator, Visiting/Outreach Coordinator & Treasurer. Local chapters are comprised of the individual members that provide parent, CHD patient, caregiver and family support programs. Members are families and patients affected by congenital heart defects/disease and others who wish to support them. Among other things, local chapters conduct education programs and activities, lead fundraising initiatives, manage Accredited Visiting programs, and host educational, awareness and social activities for members. In short, local chapters work one-on-one with children, CHD patients and families to fulfill MLH’s mission and vision.

2.10 Mended Hearts and Mended Little Hearts Chapter Requirements

Hospitals and medical professionals that work with MH and MLH and our medical advisory board have suggested that we create very clear policies and guidelines and consistently enforce them. That way, hospitals and medical professionals can count on MH and MLH chapters to provide support to patients, caregivers and families in a way that enhances the medical care they give and doesn’t violate any of their policies. They also can always count on MH officers and MLH coordinators to act professionally.

In addition to complying with these policies, it is possible that your chapter officer or coordinators and visitors will need to attend any volunteer training the hospital provides.

These policies are not designed to be punitive in any way, but to help all our chapters work with our hospitals and cardiology practices and to work together as part of a national organization.

Goal: Our goal is that all Mended Heart and Mended Little Hearts chapters run smoothly, give patients, caregivers and families support as quickly as possible, have the resources they need to run effectively, and have enough leaders to adequately fulfill local heart patient and CHD family needs.

Mandatory Requirements: These requirements are mandatory so Mended Hearts and Mended Little Hearts can comply with its audit requirements and to protect our chapters as well.
1) ALL Mended Hearts officers and Mended Little Hearts coordinators must **always act in the best interest of The Mended Hearts, Inc. local and national**. If, at any point, an officer or coordinator feels unable to promote, support and act in the best interest of MHI, that officer should notify his or her ARD, RD, and/or MH and MLH national officers immediately. Hopefully, any questions or concerns can be resolved quickly.

2) **Annual Reports** must be submitted no later than the date set out by National. These reports are necessary for MHI to file its taxes, pay fees, and submit to its annual voluntary audit. If the annual report is not received/postmarked by the date set by National, the chapter will be issued a written warning. If the annual report still is not filed, the chapter will be in violation of MHI policies and must cease operating as a MH or MLH chapter. If not resolved, the chapter will lose its EIN. In addition, the chapter could be asked to pay the state filing fees incurred by The Mended Hearts, Inc. as well. The chapter will also be asked to turn over all bank account statements so that MHI can complete their audit.

3) Each chapter MUST have **2 unrelated** signatories who do not live in the same home on the chapter **bank account**, one being the Treasurer.

4) If a chapter has over $5,000, those listed on the bank account must be **bonded**.

5) To ensure a cohesive and strong national organization, all chapters must **promote MH and MLH national events**, such as national and regional conferences, Day of Giving, Rock Your Scar, Roar ‘N Run, Remember Our Hearts, etc. through announcements at educational meetings/social events, chapter’s social media sites, and any other forms of communication the chapter has established to communicate with members.

6) At least one officer or coordinator from each chapter should attend, if at all possible, any leadership training conferences, webinars or other programs provided by the national organization. These training programs and webinars are designed to help chapters learn about key leadership skills, including speaking skills, and keep informed of important programs, issues and chapter leadership information and tools.

7) At least one chapter officer/coordinator MUST have email and computer ability to successfully receive information from the ARD, RD, national officers and National Resource Center. This email address must be active and be checked on a regular basis to assure updated information is received.

8) Mended Hearts Chapters should have four officers within their leadership team—President, Vice-President, secretary and treasurer. Chapters may have more than these four but should at least have these four. Each of these officers should have voting rights within the chapter. Chapters that do not have all four leadership positions filled may contact their ARD for help. Please note that not all of the leaders have to be patients, but at least two of them must.
9) Mended Little Hearts Chapters should have four coordinators within their leadership team—lead coordinator, education coordinator, outreach/visiting coordinator and treasurer. Chapters may have more than these four but should at least have these four. Each of these coordinators should have voting rights. Chapters that do not have all four leadership positions filled may contact their MLH RD for help. Please note that not all of the leaders have to be CHD parents, but at least one of them must.

10) All officers or coordinators in a chapter must sign a Memorandum of Understanding form (Appendix B). For officers, please email the signed forms to your region’s Assistant Regional Director and to the national office. For coordinators, please email the signed forms to the MLH Board Director and to the national resource center.

11) All MH leaders must follow all chapter treasury, fundraising, and spending requirements set forth in this document and in The Mended Hearts, Inc. Bylaws.

3 Starting a Mended Hearts or Mended Little Hearts Chapter

3.1 Why Start a Mended Hearts or Mended Little Hearts Chapter?

Mended Hearts has been offering the gift of hope to heart patients, their families and caregivers for more than 65 years. Mended Little Hearts started creating chapters to support families with children who have congenital heart defects/disease in 2004. Recognized for its role in facilitating a positive patient-care experience, Mended Hearts and Mended Little Hearts partner with about 400 hospitals and rehabilitation clinics across the country and offers services to heart patients, caregivers and families through visiting programs, support group meetings and educational forums.

The Mended Hearts, Inc. mission is “to inspire hope and improve the quality of life of heart patients and their families through on-going peer-to-peer support, education, and advocacy”. Because Mended Hearts and Mended Little Hearts are made up of the very kinds of people they serve – heart patients, their caregivers, their families, and others impacted by heart disease, its members draw on personal experience as they help others.

Mended Hearts and Mended Little Hearts support groups help people understand that there can be a rich, rewarding life after a heart event or having a child with a congenital heart defect. Members listen, share their experiences, learn from healthcare professionals and volunteer to talk to other heart patients, caregivers and families about what they may face including lifestyle changes, depression, recovery, and treatment. Annually, Mended Hearts and Mended Little Hearts volunteers make an average 200,000 visits to patients and families in hospitals, online and by phone.
Patients diagnosed with heart disease and parents with children who have been diagnosed with a congenital heart defect need to know that they are not alone and that there is hope in the midst of their crisis. However, even well-meaning family, friends and compassionate medical staff may not be able to offer them the strength and comfort that they are looking for. Therefore, Mended Hearts and Mended Little Hearts connect them to others who truly understand because they have/had heart disease or a congenital heart defect or have/had a child with a heart defect. The goal of MH and MLH is to give families the hope, support and resources they need to care for themselves, their child and their family.

Patients with heart disease, their caregiver, and families and caregivers of children with congenital heart defects/disease often feel very alone. Even when they receive wonderful medical care and have family and friends to support them, they still want to talk to others who truly understand what it is like to have heart disease, be a caregiver of a patient with heart disease or be a parent of a child who has a heart defect and may need open-heart surgery or other procedures. Medical professionals are highly trained to deal with the medical issues, but they are not typically able to provide the emotional support that these patients, families and caregivers need.

Forming a new chapter takes a lot of work, and often new chapter leaders will have many questions. This manual is designed to make it easier for leaders of newly formed chapters to have access to the resources and information they need. Please keep in mind that there are Assistant Regional Directors, Regional Directors, National Steering Committee members, and staff available to assist you. Don’t hesitate to ask questions or let us know if you need something, and we will provide it, if possible. One of the major benefits of being part of a national organization is that we already have many things leaders need so that they don’t have to “reinvent the wheel.” This manual contains the tools and information MH and MLH have in place to help its leaders.

Mended Hearts hosts conferences to train volunteers and provide networking opportunities. The national resource center also publishes a quarterly magazine, Heartbeat, to communicate valuable information, chapter news and inspirational stories and is mailed to all members’ homes.

### 3.2 Benefits of forming a Mended Hearts or Mended Little Hearts Chapter

A well-organized chapter that offers support programs can often be of greater assistance to its community than individuals can because:

1. It can be more effective to work with doctors and hospitals as a chapter
2. Chapters have better continuity; if an officer or coordinator is no longer able to fill their role, there are others who can take over their duties.
3) Chapters can get more accomplished because people are working together with a common cause
4) A chapter of caring people can reach and support a greater number of patients and families than a single individual
5) Chapters can create greater community awareness about heart disease, including congenital heart defects

There are many benefits to forming a Mended Hearts or Mended Little Hearts chapter. The following are a few highlighted benefits:

- Chapter officers don’t have to reinvent the wheel. **MH and MLH provide national materials, manuals, and guidance** to help interested persons with forming chapters and chapter leaders with running chapters. It is not easy to start a support chapter, but MH supplies resources to save time and make things simpler. The MHI Board and MLH Steering Committee also continue to work with chapters that are already established to help them run as effectively as possible.

- Chapters receive national staff and volunteer support from a well-established, recognized organization in the healthcare community.

- Chapters are **chartered and given a tax ID (EIN)**, which allows them to accept donations and raise funds as a nonprofit program.

- **MHI files and pays state fees** for the Charitable Organization Statement of Registration which can be as high as $350 in some states.

- MHI provides nationwide networking opportunities so chapter leaders can share experiences, learn leadership skills, and receive helpful organizational strategies.

- MH works with other national organizations that deal with heart disease and congenital heart defects to make the lives of those impacted by heart disease better.

- Print materials are provided in the form of posters, brochures, the HeartGuide, the Mended Little HeartGuide, the Courageous Heart Token and Remember Our Hearts cards and more.

- **MHI provides media relations support in the form of Public Service Announcements, media materials, and through work with national heart organizations in order to secure nationwide visibility** and local media resources.

- **MH and MLH national staff generates human-interest stories to help focus community awareness on heart disease and congenital heart defect/disease issues.** We also cooperate with other organizations that need human-interest stories to promote awareness and to advocate on issues that impact our patients, caregivers, and families.
• **Online training resources** are provided for those who wish to become accredited volunteer visitors at local hospitals. This training is based on a proven, successful visiting model developed by Mended Hearts.

• MH and MLH chapter members who are Full Members or greater can receive a subscription to *Heartbeat* magazine, the Mended Hearts quarterly magazine distributed to members and subscribers throughout the country. Each issue focuses on the topics that matter most to our readers and includes health tips, research updates, success stories, news on new chapters, and successful strategies from existing chapters.

• Chapters belong to the **largest cardiovascular peer-to-peer support network in the world.**

• Chapters are provided marketing support via web, social media, and print.

• Chapters are given assistance to establish new visiting programs with accredited hospitals for all types of heart patients, caregivers and families.

• Chapters have access to educational resources through partner organizations.

• Chapters have access to the national education and training conferences and regional cluster meetings, showcasing nationally-recognized cardiovascular speakers and educational tracks for chapter development.

• Chapters are provided **regional and local training** for volunteer leadership.

• Chapters are provided with quality patient education resources – *HeartGuide*, the Mended Little HeartGuide and GoTo Guides.

• Chapters have ongoing support through a nationwide network of over **21,000 members** and national staff members.

• Chapters are given leads in their area from national inquiries and online visiting support to heart patients/families via phone and email.

• Chapters are supported with a member database.

### 3.3 Satellite Chapters

In certain circumstances, a chapter may determine that a satellite chapter best meets the needs of their local community (versus a full chapter). These satellite chapters fall under a chartered chapter of MH, and all of the policies and procedures still apply to the membership. There are very specific laws and regulations that the IRS determines, and those rules need to be followed if a choice is made to become a satellite chapter. Detailed information and rules can be obtained from the National Resource
Center. Guidance on these satellite chapter formations will need to come from the RD and National Resource Center.

### 3.4 Different Types of Chapters

Once a chapter of key individuals is established and willing to work together to actively operate a MH or MLH chapter, it is time to formally set up the chapter. This can be done at an organizational meeting.

#### 3.4.1 Different Types of Chapters – Urban

If you live in a large metropolitan area and are starting the first MH or MLH chapter or starting a new chapter close to or within an existing MH or MLH chapter, here are some guidelines that will help all chapters maintain a strong MH or MLH presence in your area.

- MH and MLH chapters that partner together will make a bigger impact and cause less confusion when asking for donations and Bravery Bag items.
- If you have multiple chapters working to support one hospital with a visiting or Bravery Bag program, one officer or coordinator from each chapter should be involved.
- There should be one officer or coordinator at each hospital location to run the support meetings and services for patients and families held there. We also suggest that a back-up meeting officer or coordinator be available in case of emergencies. It is helpful to have that same officer or coordinator in charge of the visiting program and/or Bravery Bag deliveries for that hospital.
- Frequent communication is necessary when multiple chapters are working together.

#### 3.4.2 Different Types of Chapters – Rural

The needs and demands of a rural chapter can be different from chapters in urban areas. Here are some guidelines that will help chapters support their members if they live in a less populated area or cover a large, geographic area.

Often chapters that are located in rural areas do not have a hospital, particularly a pediatric cardiac hospital for MLH, that is close enough for them to support and there may be only a local cardiology office. This should not prevent chapters from setting up a visiting program and a Bravery Bag program.

- The visiting program can be a telephone and online visiting program. Accredited visitors, if appropriate, could also visit patients and families in person before they leave to the hospital or once they come home.
- MH and MLH can provide patients and families with the HeartGuide or Mended Little HeartGuide, even putting some in cardiology waiting rooms (be sure to include contact info).
• MLH chapters can give Bravery Bags to families before they leave for the hospital in another city.
• Chapters should partner with another chapter that has a hospital visiting program. To provide support to hospital visiting programs, rural chapters can contact consenting patients and families from their area who were visited by an Accredited Visitor from another chapter. They can also collect Bravery Bag items through drives and fundraisers, and then donate items and funds to other chapters. Urban chapters that support major cardiac hospitals bear the burden of supporting hundreds (sometimes thousands) of heart patients and families a year that come from outside of their community. All our chapters are responsible for helping support those patients, caregivers and families.

Members of rural chapters can live a great distance from each other; this means that chapters may need to modify their meetings and leadership roles to meet issues that arise because of distance.

• If members live far from one another, it may be difficult to schedule traditional, monthly meetings. Chapters may choose to meet less often. For example, they might want to schedule educational programs quarterly and have social events that are in different places throughout the region, instead of in one place.
• Chapters that are spread out may want to have leaders that are responsible for different parts of the region.

3.5 Identify Members and Build Relationships in the Medical Community

Mended Hearts and Mended Little Hearts have materials to help you find members and build relationships with doctors and hospital personnel. You can request these when you are in the process of forming your chapter and they will be provided to you. Please ask the ARD or RD you are working with to have National send these materials to you. The available materials are:

1) A customizable flyer emailed to you in PDF format with your contact information. You can print this flyer and distribute it to doctors’ offices, hospital waiting rooms, and other places prospective members might see it.
   a. Please contact Judy Himes at Judy.Himes@mendedhearts.org for this MH customizable flyer.
   b. Please contact Mandy Sandkuhler at Mandy.Sandkuhler@mendedhearts.org for this MLH customizable flyer.
2) MH and MLH brochures can be ordered in packets of 50 when you are actively forming a chapter. Please send an email to George.Humes@mendedhearts.org to have some sent to you. Brochures have a space at the bottom where chapter contact information can be attached.
3) It is highly recommended that you set up a meeting with appropriate medical professionals in your area. We have created a folder of materials for these
professionals called a **Leave-Behind Folder**. To request a folder, please reach out to national staff at:

a. Judy.Himes@mendedhearts.org for Mended Hearts  
b. Mandy.sandkuhler@mendedhearts.org for Mended Little Hearts

4) A **letter to medical professionals** about MH and/or MLH is available. (Appendix A) If you simply want to send a letter rather than provide him or her with a folder (described above), you can use this letter.

5) A **letter to potential members** is available (Appendix B)

6) A sample of a **letter to the editor** is available in the officers and coordinators area for you to customize. This letter can be sent to local newspapers to alert them of your forming chapter so that families can find you.

7) PSA’s (Public Service Announcements), or short scripts for radio announcements, are also available to you on the officer or coordinator login site in the Marketing section.

### 3.6 Pre-Charter Meeting Steps

1) Potential coordinators should arrange a date, time and place for a meeting that is most convenient to the majority of your key chapter members. For most, this is going to be during the week in the evening hours. Suggestions for a meeting location include, but are not limited to: hospital conference/meeting rooms, Ronald McDonald House, Starbucks with meeting rooms, a local library, etc.

2) Reach out to local hospital, children’s hospitals and doctor’s offices such as: cardiology offices, primary care physicians, pediatric cardiology offices, pediatricians, OBGYN offices, fetal maternal specialists, etc. Provide them with information about MH or MLH and the details of the meeting. Encourage your healthcare professionals to attend and share this information with patient and families.

3) Notify the Assistant Regional Director and the Regional Director (or National Program Director for MLH) that the chapter is prepared to hold its charter meeting. Inquire into the possibility of having a local Mended Hearts representative present at the meeting.

4) Send notice of meeting to local television, radio, newsprint, hospital public relations, and other media.

5) Place flyers in strategic locations (i.e. doctor’s offices, hospital waiting rooms, etc.).

6) Utilize social media (Facebook, Twitter, and Instagram) to get the word out.

7) Copy Charter Petition (Appendix D & E) and Charter Application Form (Appendix C) to bring to the meeting.

### 3.7 Content for Charter Meeting

While there is some flexibility in how a charter meeting is organized (Appendix F is a sample agenda), there are a few topics that must be addressed. They are:
1) An overview of Mended Hearts and the Mended Little Hearts program (the MHI Fact Sheet and the MLH Fact Sheet are recommended, along with MH or MLH brochures.) You can get the Fact Sheet from your ARD, RD or in the Officer/Coordinators’ Portal on the website.
2) Review how a local chapter might be structured and who will serve as chapter leaders (use this Manual as reference).
3) Vote on chartering a local chapter.
4) Complete charter application (Appendix C).
5) Sign charter petition (Appendix D & E)

There must be at least 10 people on the Charter Petition, of which:

- For Mended Hearts, seven must be patients or caregivers.
- For Mended Little Hearts, seven must be the parent(s)/caregiver(s) of a child with a congenital heart defect or an adult with a congenital heart defect.
- The remaining members, and any additional members, may be anyone willing to commit to forming and supporting the potential MH or MLH chapter. Parents of a child do not count as separate members for Charter Petition purposes unless they live separately. Both parents of a child may sign the petition, but they will not count as two people unless they are not living together.

3.8 Post Meeting

The president or lead coordinator should submit the following (making a copy of everything for local files) to the Mended Hearts National Resource Center:

1) Signed charter petition (Appendix D & E)
2) Membership applications should be filled out online
3) Charter application (Appendix C)

3.9 Next Steps

1) The above items will be received by the Mended Hearts National Resource Center and the chapter charter will be processed.
2) New members who join at the Full Member or above level will receive their membership pin and cards. (Note: charter members receive pins even though this is not a full member benefit.)
3) Appropriate paperwork will be filed with the Internal Revenue Service to secure the chapter its necessary proof of 501(c)3 status to start accepting donations. This process is not a Mended Hearts process but is instead a federal government process. This could take up to two weeks.
4) A supply of MH and/or MLH material (brochures, posters, etc.) will be sent to the president or lead coordinator to use in promoting the chapter. These materials are available through the national resource center.
5) The chapter’s contact information will be posted on the “Find Chapters” section at the top of the MH/MLH website. The chapter will receive a webpage with
contact information that is searchable through the national website. A chapter may decide to host their own (external) website. If that is the case the chapter can provide the link to the national resource center and the external website will be listed instead of the basic webpage.

6) Once the charter application materials are processed through the national office, an official charter certificate will be sent to the new chapter.

4 Mended Hearts Chapter Structure

Mended Hearts chapters have an official local board that consists of the President, Vice-President, Secretary, and Treasurer. Each chapter is required to have certain leadership positions, but beyond that chapters can create more leadership positions to address the unique needs of that community. Volunteers holding leadership positions at a local level can either be appointed or elected by members of the local chapter.

4.1 Mended Hearts Chapter Board and Leadership

For each chapter, MH requires that there be at least four board positions, all with a voice in decision-making.

The four board positions that each MH chapter must have are:

- President
- Vice-President
- Secretary
- Treasurer (can be added after chapter formation)

Start your chapter off on the right track and have CLEAR roles of what is expected and who is managing what tasks. Good communication is essential to forming a strong chapter.

Chapters may have other leadership positions in addition to the four required positions. Adding more board members with different talents in these areas will help your chapter grow. Have clear guidelines of the jobs you are assigning. Some suggestions are:

- Visiting Chair
- Fundraising Chair
- Newsletter Editor/Web Administrator
- Welcoming Committee Chair
- Hospital Liaison

Program tasks should be divided up to distribute responsibilities so no one person takes on too much of the work. This could include creating a structure of committees that are designed to handle specific aspects of the chapter’s activities. Not all additional
positions need to be voting positions, but they can be a good way to get people involved who would like to volunteer.

4.2 Mended Hearts Required Chapter Positions

4.2.1 Chapter President

1. Should conduct the business of the chapter, provide for the election of officers and preside over all chapter meetings. The President is responsible for keeping order and for enforcing all rules relating to debate.
2. May call special meetings of the Chapter Board of Directors or the Chapter as necessary.
3. Has authority to delegate all or any part of his duties to any chapter officer.
4. Should be familiar with the National and the chapter Bylaws and the National Manuals and documents. A President’s file or notebook should be prepared for these national documents. Updates should replace old versions. Originals remain in the file (notebook) while copies can be made for appropriate chapter members. The President’s file/notebook belongs to the chapter, not the officer, and should be passed along to the incoming President.
5. Should appoint committee chairpersons and members as needed.
6. Should make sure all the annual National Reports are promptly prepared and mailed assisting where necessary.
7. Receives National meeting minutes, memos, manuals and documents. The President informs the Board and members of significant updates.

4.2.2 Chapter Vice President

1. Has the authority to perform all the duties of the chapter President in his/her absence.
2. Performs such duties as assigned by the President. The Program Chairmanship is often assigned to the VP.

4.2.3 Chapter Secretary

1. Records the minutes and actions of the chapter, sends out calls for meetings, assists with National Annual Reports, and arranges for correspondence. Many chapters have a separate Corresponding Secretary for this purpose.
2. Sends the names, addresses, phone numbers and e-mail addresses of newly elected chapter officers to the National Office, the Regional Director and the Assistant Regional Director.

4.2.4 Chapter Treasurer

1. Receives dues and all other funds of the chapter, deposits funds in the bank, pays all bills as authorized by the President or BOD and maintains the chapter’s bank accounts.
2. Keeps an account of all receipts and disbursements and prepares a written report at all regular chapter meetings.
3. Is appropriately bonded in such amounts as determined by the National Board of Directors. See Treasurer’s manual.
4. Receives the chapter’s Membership list from the National Office that notes whose dues need to be collected. Sends appropriate national dues to the National Office.
5. Informs the National Office, the Regional Director and the Assistant Regional Director of chapter members who are deceased, left the organization or changed addresses.

5  **Mended Little Hearts Chapter Structure**

Mended Little Hearts chapters typically do not have official boards like Mended Hearts chapters; however, they are required to have a team of leaders, led by the lead coordinator, which operates like a board. Each MLH chapter is required to have certain leadership positions, but beyond that, chapters can create a structure that is best suited to meet its needs. As such, the individual chapter structure of each MLH chapter will vary depending on the community and the unique needs of that community. Volunteers holding leadership positions may be either appointed or elected by members of the local chapter.

5.1  **Mended Little Hearts Coordinators**

For each chapter, MLH requires that there be at least four leadership positions, all with a voice in decision-making.

The four key leadership positions that each MLH chapter must have are:

- Chapter Lead Coordinator
- Education Coordinator
- Visitor/Outreach Coordinator
- Treasurer (can be added after chapter formation)

Start your chapter off on the right track and have CLEAR roles of what is expected and who is managing what tasks. Good communication is essential to forming a strong chapter. As soon as possible chapters need to designate a treasurer; initially this might be the lead coordinator, the education coordinator or the visitor training or outreach coordinator.

Chapters may have other leadership positions in addition to the four required positions. Adding more board members with different talents in these areas will help your chapter grow. Have clear guidelines of the jobs you are assigning. Some suggestions are:
Program tasks should be divided up to distribute responsibilities so no one person takes on too much of the work. This could include creating a structure of committees that are designed to handle specific aspects of the chapter’s activities. Not all additional positions need to be voting positions, but they can be a good way to get people involved who would like to volunteer.

After two years, coordinators should seek new leaders to take over their role so that the chapter can continue to evolve. Coordinators are not permitted to remain in the same position for more than five years. Please note, for coordinators in their current position, this rule takes effect as of January 2017. As of January 2021, you must leave or rotate out of your current coordinator position.

5.2 Required Mended Little Hearts Position Descriptions

5.2.1 Chapter Lead Coordinator

Description

The lead coordinator is the main representative of the MLH chapter and must act professionally and in the best interest of MLH at all times. The lead coordinator reports directly to their MLH RD and also reports to MLH national. The lead coordinator will oversee all local program activities and represent the chapter at the national level. They will oversee treasury duties and duties of other chapter leaders and delegate appropriate tasks among the leadership. They will also create a decision-making process for the chapter leadership.

Time Commitment

It is vital that there is consistent leadership in the chapter in order to offer continuity and uniformity for the heart families and caregivers who are served. The minimal length of commitment recommended is one-two years. Chapter leadership should change or rotate every 2-3 years. The lead coordinator should serve no longer than 5
consecutive years in this position. If they believe they have trouble finding a replacement, they should contact their RD a year in advance to assist in this process.

The time that a coordinator spends working with his or her chapter will vary according to each location but is estimated to be from 10-20 hours a month initially. However, the time committed is contingent upon desired activity level.

**Recommended Responsibilities**

- Designate leaders for required leadership positions of the chapter
- Organize leadership meetings for chapter planning and strategy throughout the year (have a meeting back up in case of a family emergency so meetings aren't canceled last minute)
- Develop relationship with individuals and organizations in your community that support or enhance the MLH mission
- Together with outreach coordinator or visitor training coordinator, establish relationships with healthcare entities/hospitals to help establish the MLH program at their location, as well as to recruit healthcare professionals to serve as liaison to healthcare facility when appropriate
- Recruit new members and market the chapter by promoting services and benefits
- Work with educational coordinator to plan chapter meetings and educational programs
- Act as official spokesperson for MLH by providing accurate information about the program’s mission and goals to parents/families, the health community, the media and other organizations
- Work with the educational coordinator or CHD awareness coordinator to ensure that National Awareness campaigns are carried out on the local level
- Work with visitor training coordinator to identify and recruit potential parent/caregiver visitors and to plan training for these visitors
- Secure funds as desired to meet the local and national program need or designate and work with a fundraising coordinator to do so
- Oversee treasury responsibilities and ensure treasurer complies with requirements in the MH and MLH Treasurer’s Manual
- Assist in encouraging parents to complete needs assessment surveys for the program and for Mended Hearts when needed
- Ensure regular and effective communication with local Mended Hearts chapter whenever feasible
- Conduct training for accredited visitors

**5.2.2 Outreach Coordinator/Visitor Training Coordinator (required position that could also be termed a co-coordinator)**

**Description**

The chapter will need either an outreach coordinator or a visitor training coordinator. An outreach coordinator is appropriate where there is no local hospital that performs
catheterizations or surgeries on children with CHD. The visitor training coordinator is required when there is a local hospital that performs catheterizations or surgeries on children with CHD. Both positions will be responsible to the local chapter lead coordinator and are part of the leadership team. The visitor training coordinator will oversee all aspects of the chapter’s visiting program. This includes: working with hospitals and other medical facilities, recruiting and managing volunteers for this program, annually training potential visitors, etc. The outreach coordinator will be the person who works with the cardiologists and other medical professionals in the area and trains visitors to visit over email, telephone or when the family gets home from the hospital. The outreach coordinator or the visitor training coordinator is responsible for the implementation and delivery of Bravery Bags or Bravery Chest items and angel boxes to either the surgical hospital or the cardiology practice in their area.

Time Commitment

Approximately two years is the recommended term length for this commitment. It is highly recommended that at two years the visitor training coordinator or outreach coordinator determine whether he or she would like to continue or transition out of the position to avoid volunteer burn-out. Time involved will vary according to the number of hospitals and accredited visitors within the MLH program. However, it is estimated to be between 5-10 hours per month.

Recommended Responsibilities

- All coordinators MUST become trained as MLH accredited visitors. Training is for everyone offering support to chapter members, not just visiting coordinators. Coordinators will work with the National Visiting Chair on how to receive accredited training.
- Screen and select accredited visitors (for the outreach coordinator, this will be for telephone and internet visiting)
- Conduct training for accredited visitors
- If necessary, assist in arrangements for hospital volunteer training (visitor training coordinator only)
- Complete evaluations of individual class sessions and the overall Accredited Visiting course and program (visitor training coordinator only)
- Arrange regular updates and continuing education for accredited visitors (at minimum annually)
- Arrange a recognition system/event to show appreciation for the volunteer accredited visitors
- Assist leadership team to resolve any accredited visitor issues
- Assist leadership team as needed to accomplish chapters’ goals/needs
5.2.3 **Education Coordinator (required position)**

**Description**

The educational coordinator is responsible to the lead coordinator and is part of the leadership team. The educational coordinator will oversee all educational aspects of the MLH program. This includes continuing education to both internal members and the community at large. If there is a CHD awareness coordinator, some of community education programs will be planned in conjunction with that position.

**Time Commitment**

Term length for this commitment is recommended to be two years, with a one-year minimum term. At two years the educational coordinator should evaluate whether he or she would like to continue or transition out of the position to avoid volunteer burn-out. Time involved will vary according to the number of events and activities planned for the Mended Little Hearts program. However, it is estimated to be between 5-10 hours per month.

**Recommended Responsibilities**

- Plan/coordinate a minimum of four educational programs/workshops and/or speakers annually
- Plan/coordinate social events
- Work with leadership team to determine needs and areas of interest to internal members
- Maintain educational events calendar/meeting schedules
- Type/distribute agendas/related materials as appropriate in the absence of a secretary
- Coordinate communications for members in the absence of a newsletter/web editor/social media coordinator
- Assist in the review of needs assessment surveys in order to provide feedback for implementing improvement of the program/services offered.

5.2.4 **Treasurer (required shortly after chapter is formed)**

**Description**

The treasurer is part of the leadership team, oversees all chapter finances and has duties set out in the Treasurer’s Manual. The treasurer maintains the chapter’s bank account, helps to create budgets, gives financial reports to the leadership team, creates a system for reimbursing expenses and for giving receipts to donors, and manages other financial issues with the chapter.
Time Commitment

Term length for this commitment is recommended to be two years, with a one-year minimum term. At two years, the treasurer can determine whether he or she is able to continue in that position. Time involved will vary according to the fundraising activities of the chapter and the chapter’s budgetary goals. However, it is estimated to be between 5-10 hours per month.

Recommended Duties (full description in Treasurer’s Manual)

- Open and maintain bank account (at least one other person who is not related or in the same household must be on the account—can be another chapter leader.)
- Provide bank statements and financial reports to leadership team monthly
- Help leadership team in creating a budget for the chapter
- Help leadership team in determining fundraising goals
- Ensure receipts are provided to each person who makes a donation to the chapter
- Manage reimbursing chapter members for appropriate chapter expenses

5.2.5 Additional Volunteer Job Descriptions

This manual contains the descriptions for the four main volunteer positions within any MLH chapter (those being lead coordinator, visitor training or outreach coordinator, educational coordinator and treasurer). In addition to these four volunteer positions, MLH offers the following descriptions for other key positions that could be included:

- Fundraising Coordinator
- Communications Coordinator
- Membership Coordinator
- Mended Little Angels Coordinator
- Welcoming Coordinator
- Mended Hearts Liaison
- CHD Awareness Coordinator
- Dads With Heart Coordinator
- Newsletter/web Editor
- Secretary
- Bravery Bag Coordinator
- Teen Coordinator

Fundraising Coordinator

The fundraising coordinator will work with the leadership team to determine the chapter’s fundraising needs. This position is responsible for the design, planning, set-up
and evaluation of fundraising activities for the chapter. This might include local grant solicitation, obtaining the donation of operational supplies, and coordination of special events.

**Communications Coordinator**

This position is responsible for all media relationships on behalf of the chapter. Upon request, the national office will provide template media tools (e.g. news releases) to assist with this important activity. This position might also be responsible for internal communications to members in coordination with the lead coordinator.

**Membership Coordinator**

The Membership Coordinator's primary focus is on recruitment of new members and maintaining a membership database. It may also include keeping a record of members at each meeting or event.

**Mended Little Angels Coordinator**

Often chapters want to provide support to families who have lost children to congenital heart defects. A Mended Little Angels coordinator must be a parent who has lost a child to CHD and who would like to lead a Mended Little Angels of MLH. Mended Little Angels can meet separately from MLH chapters (many meet directly before the MLH meeting) and should have speakers who benefit parents who have lost children. Mended Little Angels parents are always welcome to be part of the larger MLH chapter as well. Contact the MLH National Bereavement Chair on how to best help this chapter get started in your area. Mended Little Angels coordinators may also maintain a chapter on Facebook and/or create and deliver angel boxes and cards on appropriate dates. They are to implement National Remembrance events on a local level.

**Welcoming Coordinator**

The welcoming coordinator determines ways of making new members feel welcome within the chapter. This might include paring a new member with a buddy for the first few meetings. New members should be introduced to the chapter in some form as well (email is often appropriate).

**Mended Hearts Liaison**

For chapters in which an official relationship will exist between a Mended Hearts chapter and a Mended Little Hearts chapter (which is encouraged), the Mended Hearts liaison, in coordination with the lead coordinator, will work to ensure the Mended Hearts chapter is kept abreast of the chapter’s activity. Additionally, this position will ensure any and all items of interest by the chapter are shared with the MLH chapter.
CHD Awareness Coordinator

The primary focus of the CHD awareness coordinator is planning and overseeing CHD awareness activities, particularly for CHD Awareness Week, February 7-14. The awareness coordinator implements national awareness events on a local level.

Dads with Heart Coordinator

Sometimes dads need a different kind of support than moms and other relatives. It can be beneficial to have a coordinator that focuses on fathers and who plans activities just for them. Chapters who do this tend to plan casual activities where the dads can meet in a social environment. Sports bars and food (no alcohol can be purchased by MLH) often are good enticements to attract fathers to events.

Bravery Bag Coordinator

This person oversees the chapter’s Bravery Bag program. The braver bag coordinator will work closely the visiting coordinator to maintain consistency in the delivery and make-up of the bags to the hospital so that supplies never run out. They are responsible for determining what items are in the Bravery Bags, obtaining donations for Bravery Bag items, hosting Bravery Bag item collection drives, ordering MLH merchandise to be included in Bravery Bags, and finding a location to store Bravery Bags. Some chapters have Bravery Bag parties where they fill bags together. This position would oversee those events along with other coordinators. Please note, there is a Bravery Bag webinar available for viewing; this webinar explains the program and how it works.

Secretary

The Secretary is responsible for all correspondence received and sent by the chapter and documentation of activities as appropriate.

Newsletter/Web Editor/Social Media

The newsletter/web site/social media (Facebook, Twitter, Instagram, etc.) coordinator provides information and distributes communications to members and the community-at-large. The newsletter or web editor is responsible for the content, layout, design and distribution of communications, websites or social media sites maintained by the chapter.

Adult/Teen “Surviving CHD” Coordinator

If your chapter has several teens or adults with CHD, it might be beneficial for them to have their own activities. Teens with CHD often start to feel “different” than other children and it is good for them to know they are not alone. A parent of a teen with CHD or an adult with a CHD would be a good leader.
6 MH and MLH PROGRAMS

Because each local area is different, there may be different program needs in each area. Planning and implementing MH/MLH programs can take a lot of work, but don’t reinvent the wheel. We have many chapters who have been successful in having chapter programs, meetings and events, and they are glad to share information with you. In addition, your ARDs and RDs will be a good source of help and information.

Also, remember that families often join Mended Hearts and Mended Little Hearts when in crisis. When the main “crisis” is over, or over temporarily, they often are not as active in their chapter. That’s okay. However, to keep patients and families engaged, you will want to consider planning activities where families feel like they are helping others. Making things for kids in the hospital, doing something nice for the nurses and social workers, putting Bravery Bags together, creating awareness, etc. will help patients and families stay involved and feel like they are able to help others.

In addition, patients and families often come back when they have developed relationships with others. Consider activities, including social activities, which allow families to form bonds.

6.1 MH and MLH Program Checklist

The following is a checklist you can use when preparing a program or event. All of these items may not apply.

_____ Speaker/presenter is recruited and confirmed.

_____ Program agenda is created with presenter bio, if needed.

_____ Speaker is re-confirmed within 24 hours of program.

_____ Back-up plan is in place if speaker has emergency and needs to cancel.

_____ Location/facility is confirmed.

_____ Meeting details have been sent out well in advance of meeting (emailed, posted on social media sites, posted at hospital/doctors’ offices, put in health section of paper (usually free), on website and distributed in any other way that is appropriate for the area).

_____ Refreshments are ready. (Some grocery stores or restaurants will donate refreshments if they have enough advanced notice).

_____ Signs are made to put on facility doors so people know where to go.

_____ Someone has been assigned to greet people as they arrive.
Someone has been assigned to make sure new people are introduced and feel welcome. A buddy could be assigned for them.

RSVP’s have been received for social events where a number is needed. Evite can be a good tool for this, and it is fun to use. You also can create an event on social media.

A reminder email and about the meeting has been sent out a few days before the meeting along with social media posts.

A sign in sheet and any other handouts are ready for the program.

6.2 MH and MLH Program Ideas

The following are some program ideas and activities compiled by MH and MLH Leaders.

Medical—Cardiac Related

Cardiologists and Surgeons—A cardiologist or surgeon could come and speak on a variety of topics. Many patients and families enjoy seeing their doctors outside of the stressful situation they were in while in the hospital. Some examples of topics are:

- New treatments and technologies for patients
- Imaging (ex. Echo, Cath, MRI, etc.)
- Treatment of CVD/CHD patients
- Issues CHD children face growing up
- Transition to care as an adult

Social Worker or Child Life Specialist—These professionals can explain to patients and families what they do and how they can help the families. They also can tell them how they work with the MH/MLH group. Sometimes Social Workers can tell patients/families about resources that are available to them as well.

Perfusion Teams—These professionals can talk to families about bypass and ECMO. This is often a big fear for most patients and parents, and it may make them feel more comfortable if they know more about it.

Medical—Other Fields

Nutritionist—Heart patients and CHD kids often have different nutritional needs than other children. Often, patients and parents need to find ways to add fat and calories to their diet yet keep their hearts healthy. A nutritionist could talk about ways to do this. It would be helpful to have him or her talk about ways to do this while not adding too many calories to the rest of the family.
EMT—Some patients and parents find it helpful to know their rescue workers and how they respond if there is an emergency. You can ask a local fire department to let you do a tour and to talk to families about EMT procedures as well. Kids always love a fire truck.

Genetic Counselor—Often people want to know about information related to genetics and CHD. A frequent question of CHD parents is, “What is the likelihood of having another child with CHD or of my children having a child with CHD?” Families also want to know about any possible genetic causes of CHD.

Counselor/Psychologist—There are many topics for professionals in this field.

• Stress management
• Issues married people face when dealing with a with chronic/life-threatening illness
• How to deal with siblings
• How to take care of oneself while caring for a spouse or special needs child
• Psychological effects of chronic illness on the family (so they know what is “normal”)

Massage Therapist—What family dealing with CVD/CHD couldn’t use a good massage?

Infant Massage—This can be used with babies to help them heal. Someone well-trained in this technique could make a good speaker for families with young children.

Dentist—Many patients and families would like to ask a dentist questions about the need for antibiotics and dental issues that might be impacted by heart disease/defects.

Neurodevelopmental Specialists—More and more children with CHD are being diagnosed with neurodevelopmental issues. Having a professional come talk to your families may help answer a lot of their questions.

Services Families May Need & Joint Programs

Financial Management and Budgeting—Many patients and families are faced with a large amount of medical debt. Even if they don’t have medical debt, they often have to take time off of work or quit a job to care for a CHD child. These families need information about how to manage their finances.

Medicare—Many patients and caregivers need education and support to understand Medicare and how to receive the most benefits to manage their expenses.
Waiver Programs such as Medicaid—CHD families need to know what is available to them in their state. It would be very helpful to have a speaker on this topic, or at least to provide information to all new members about what is available to them.

Life Link or Other Transport Services—Life Link teams and/or other transport services can explain the process of picking up children via helicopter/ambulance. This explanation can be really helpful because at the time your child has to be picked up you are frantic and may not understand fully why you cannot ride in the transport vehicle. They drive excessive speeds to get your child to the nearest facility to save their life. www.lifelinkfound.org.

Special Education Advocate—Some CHD children will have special educational needs. A Special Education Advocate can talk about options available to these families and what process they should undertake to get appropriate services and accommodations for their child.

American Medical ID or Other Medical ID Speakers—Patients and Families should know about medical ID for children and adults. Bear in mind that MH/MLH members get 10% off of purchases, and MLH gets 10% to our organization.

Make-a-Wish—This organization offers “wishes” to children with life-threatening conditions. A speaker can come and talk about their organization and how kids might qualify for a wish. It is great to have a family present whose child was granted a wish so they can talk about their experience as well.

Down Syndrome Association—Many children with Down Syndrome also have CHD. Consider partnering with them on a program that would educate everyone.

Children’s Heart Foundation—Many families are interested in CHD Research. Children’s Heart Foundation is an organization committed to CHD research only. You might consider having a joint event or program.

Pet Therapy – Many adults and children with complex illness can benefit from pet therapy. You might consider inviting therapy animals to a meeting.

Education

Adults With CHD—It can be very helpful for families to see and hear from adults with CHD. Adults who are doing well can be a big inspiration to families, especially those with small children. Families may want to ask questions, so be sure to allow for that. The ACHA (Adult Congenital Heart Association) is a great resource, and they have offered to provide speakers where possible.

RSV Awareness—Kids with heart defects are more susceptible to the RSV virus, and for them it can be life-threatening. Your pediatrician’s office will probably be able to
provide you with the name of someone who could inform families about RSV and the injection that can help prevent young children from getting it.

Mended Hearts--If you’re fortunate enough to have a traditional Mended Hearts chapter nearby – invite them to one of your monthly meetings to talk about chapter services. . . and consider taking it a step further to discuss ways your group and the chapter can work together.

Mended Little Hearts – If you’re fortunate enough to have a Mended Little Hearts chapter nearby – invite them to one of your monthly meetings to talk about their chapter and bring their kids! Consider how you can work together to promote both brands of the organization.

American Heart Association (AHA)—Someone from the AHA could come and speak about what they do for CVD/CHD and how they can work with MH/MLH groups. Often there are a lot of questions for this speaker, so be sure to leave time.

CPR & First Aid—These are essential techniques for patients and families. The AHA now has CPR Anytime kits that can be bought if the group has money. Some families might find it worthwhile to pay for their own kit. Instruction on CPR and First Aid should only be done by someone qualified to do the training.

Yoga Instructor—Some chapters have had a yoga instructor come and teach the families some techniques to help them center and relax. Yoga can be wonderful for people under a lot of stress. Be sure that the instructor is very experienced and no moves are done that could be dangerous or that could injure anyone.

Music Therapy—Many hospitals have people who do music therapy with kids and adults. It might be fun to have someone come and do a music therapy session for the group.

Hospital/Cath Lab Tours—Sometimes it is very helpful for families to have actual tours of the hospital, cardiac unit or cath lab. This allows them to see the facilities and ask questions at a less stressful time. These tours should be led by qualified medical personnel only. Cath lab tours tend to be very highly attended for some of our groups.

Sharing Meetings or Sharing Time

Sometimes it is nice for families to get together and share experiences and feelings. Often for these meetings, it is still helpful to have some sort of structure. You could have all present tell a little about their story, and then you could start discussion with the whole group or in subgroups.

You could also have sharing time at meetings where people get to talk about CVD/CHD issues. These issues could be in relation to your speaker or they could be on
a different topic. You might do this after your speaker for people who want to stay and share, allowing those who don’t to leave.

A few question ideas are:

- If you could tell someone entering the CVD/CHD world one thing, what would it be?
- The thing that helped you get through this experience the most was __________________? 
- What would you like the world to know about CVD/CHD?
- What changes would you like to see that relate to CVD/CHD?
- What is the most important thing that you get out of being in a support group?
- What ways can your MH/MLH group help others?
- When you first found out about your child’s CHD, or your Heart Disease, what feelings did you have? How have you dealt with these feelings, and how can you help others to deal with their feelings?
- What are your biggest concerns about your child or yourself?
- What have been the most helpful resources you have encountered?
- How can you best help your child grow up with CHD?
- What suggestions do you have for dealing with siblings of a CHD child?

**For Some Fun**

All groups should do some social activities a year so families can get to know each other and have fun in a safe environment. Sometimes families don’t get to participate in many fun activities because of financial constraints and because they are concerned about their child being exposed to germs. Some ideas for social activities are:

- **Meet & Greet**—You can host a casual social gathering so families can get to know each other. If possible, find a more private room or space so families can talk, even if it is in a restaurant or other social location.
- **Picnics**—Be sure to plan the picnic in a safe location where children can have fun without parents having to worry constantly about them wandering off. You may want to plan a few vegetarian dishes if meat will be your main dish. Bring plenty of water for thirsty bodies. Bring hand sanitizer for little hands that have been on the playground.
- **Pool Parties**—During the warm months, a pool party can be a lot of fun. Be sure to plan at a location where there will be lifeguards on duty. If the party is during the day, bring extra sunscreen for anyone who forgets.
- **Art Parties**—Most kids and many adults like making art. You can plan an art party at a place designed for arts and crafts, like a ceramic-making store, or you can bring your own supplies to your normal meeting place. Sometimes kids can make art for a particular cause—like making Valentines to give to children in the hospital on Valentine’s Day or like making art to sell at an auction. Adults
often like to participate in painting events or other adult events as well, and it is a fun way to get to know each other.

- **Bravery Bag Assemblies**—Groups can have a lot of fun putting together Bravery Bags for families who have children in the hospital. Chapter members and others can bring items to fill the bags, but they will need to be sorted before filling them so plan to come early to that event. Be sure you have ordered enough Bravery Bags to fill. If you want to invoke discussion during these events, you might ask everyone what they feel is the best Bravery Bag item and why.

- **Recreational Outings**—Sometimes it is fun to have families join together for mini golf, bowling, or other recreational events. Be sure to find things that most CHD children and adults will be able to do. For example, a trampoline park may not be the best option. You can have friendly competitions, or you can just let people play and have a good time.

- **Bingo Night**—Bingo is a fun game for people of all ages. You could get some prizes donated for Bingo Night.

* For programs where someone from another organization is invited to speak to your group, consider asking the representative if they have an organization or forum whereby Mended Hearts/Mended Little Hearts can share its program and objectives as a return favor. Who knows, they may be looking for program topics as well!

7 **Visiting and Hospital Support**

Hospital visiting is an essential piece to Mended Hearts and Mended Little Hearts mission of providing peer-to-peer support. Approaching your hospital about their visiting requirements and guidelines is the first step to establishing your chapter’s visiting program. After completing hospital requirements, ensuring that your visitors receive training is the next step. Please contact the National Visiting Chair for information on how to obtain accredited visitor training. It is important to remember that visiting is not right for everyone; it can bring back memories of your heart journey or your child’s CHD journey and be too much for some. Know that if this is not right for you, there are many other volunteer opportunities available within your chapter.


7.1 **Working with Hospitals**

- Hospitals want to be sure that MH and MLH members are not referring their patients to other hospitals. If your chapter visits at multiple hospitals, remind staff that we support ALL hospitals and ALL staff. We only offer support; no medical or legal advice is ever given to heart patients and families.

- Following hospital protocol, maintaining a good relationship with hospital staff and being consistent with meetings, Bravery Bag deliveries and support are vital to maintaining MLH’s reputation.
• Follow all hospital requirements, in terms of volunteer training and regulations for volunteers. Mended Hearts and Mended Little Hearts must always assure proper hospital rules and procedures are followed.

8 Educational and Support Resources

8.1 Mended HeartGuide

The Mended HeartGuide is a printed and digital resource for patients, caregivers, and hospitals. This premier educational resource is distributed during in-person visits and in other community events to provide education to patients and families. The Mended HeartGuide can be found at www.myheartguide.org.

8.2 GoTo Guides

Mended Hearts also develops and distributes disease specific guides, called GoTo Guides. Some topics of the GoTo Guide library are Heart Failure, Valve Disease, AFIB, Depression and Heart Disease, and High Cholesterol.

8.3 Mended Little HeartGuide (MLHG) & Lites

The MLHG is a digital resource guide for families, caregivers and hospitals. Along with the Bravery Bag, the MLHG is the primary way that MLH markets itself to new members and medical staff. Postcards advertising the MLHG can be put inside Bravery Bags, hospitals, rehabilitation clinics or cardiology offices. The postcards can be ordered from national through the coordinators portal on the MLH website. The MLHG can be found at www.Mendedlittleheartguide.org.

MLH has created a printed Mended Little HeartGuide Lite that can be put in cardiology offices, hospitals, Bravery Bags, and given to newly diagnosed families. Be sure to put your contact information on the Guide. These can be ordered through the National Resource Center.

8.4 Bravery Bag Program

The Bravery Bag is the signature program of the Mended Little Hearts National Organization. It is currently the number one recruitment method for new members and the primary way that prospective members learn about who we are and what we do. MLH National provides the empty Bravery Bag, a wristband and a pen to chapters for them to then fill with items that they have collected. The bags, pens and wristbands are provided free-of-charge as funds allow; chapters only have to pay for the shipping. These items can be ordered on the coordinators’ portal.

Chapters are responsible for holding fundraisers to pay for additional bravery bag items or for holding bravery bag drives to collect donated items. These items vary depending on the needs of the community the chapter serves. We do request that if
all possible, chapters add our custom MLH Bravery Bag lion ($4 each) and a courageous token ($2 each) to each Bravery Bag. These items are ordered online in the coordinators portal.

If possible, schedule quarterly Bravery Bag assemblies at your warehouse, library, hospital or a member’s home; this is a great way to get to know your members. Many families that have received Bravery Bags love to participate in Bravery Bag assemblies as a way to give back.

Below is a list of suggested Bravery Bag items that chapters can add in addition to the lion and the courageous token:

- Pocket-sized tissue packets
- Crayons - 8 count
- Coloring books
- Crossword or Sudoku puzzle books
- Children’s books
- Blank journals (approx. 5” x 7”)
- Lip balm
- Travel-sized hand sanitizer
- Travel-sized toiletries
- Individually packaged snacks
- Water bottles

Here are some other important things to know about Bravery bag items.

- On branded Bravery Bag items such as water bottles and journals, only the MLH National or local MLH chapter logos are acceptable.
- If your chapter obtains a local sponsorship for branded items, the logo of the sponsoring company is also allowed to go on the item.
- If a hospital is willing to pay for a chapter’s bags in order to have their hospital logo on one side of the bag, they may do so, but they must follow these rules:
  - The bag must also include either the MLH National or local MLH chapter logo on one side of the bag.
  - The bag must have the same dimensions and coloring as the national Bravery Bags. Here are those dimensions:
    - Description: MLH Bravery Boat Bag
    - Manufactures Item: Saratoga
    - Bag Color: Natural / Deep Red
    - Bag Size: 18”w x 7” x 12”h
    - Imprint: 2 colors - SS-40 Red & SS-19 Brown
    - Imprint Size: 4.3 x 6
    - 80 GSM premium non-woven polypropylene natural-color tote with contrasting 25” handles and bottom panel, front pocket, side pockets, and interior accessory loop
- 20% recycled post-industrial polypropylene, reusable, 100% recyclable
- If you are interested in purchasing wristbands, water bottles, pens or mini Bravery Bags in bulk, we already have these items branded for you. You can purchase these items directly from Frank Varljenfrank. His contact information is below.

Frank Varljenfrank@greentruckmarketing.com

804-897-3898 /804-399-8657 www.greentruckmarketing.com

8.5 Gas Cards

Some of our chapters are very far from the cardiac hospitals that their patients travel to. In some cases, these chapters raise money to provide gas cards and cash to assist families with travel costs to the hospital. MLH’s policy regarding these items is that they are allowed to be given to families, but they are NOT allowed to go in the official Bravery Bags so that Bravery Bags are fairly consistent across the country. If your chapter is going to provide gas cards or cash for travel, they must abide by the following guidelines.

- Chapters can only add these items if they do it for ALL families. There must be continuity in what they give out. If they give them during a month, like February, or a week, like CHD Awareness Week, only, that’s fine so long as they are given to everyone during that time.
- Please inform National that you are giving these items out to families.

8.6 Light Bravery Bags

Light Bravery Bags are ideal for non-surgical heart patients, cath patients, teenage patients and for the cardiology offices to give to newly diagnosed patients. These light bags allow chapters to reach more heart patients and families for less investment and cost. They should include, at the minimum, the following:

- MLH information
- Wristband
- Comfort item for child and something for the parent.
- Mended Little HeartGuide Lite

The cost of an empty mini Bravery Bag is $2.50. These bags do NOT replace the full-sized Bravery Bag for any chapter. If your hospital requests these drawstring bags ONLY, please obtain approval by National first.
**8.7 Bravery Chest**

Another way to provide additional support to families in the hospital and to recruit new MLH members is with a Bravery Chest. Bravery Chests are ideal for hospitals without a Bravery Bag program or for chapters who want to connect with heart families at the local cardiology office. Your chapter and hospital can decide what items your Bravery Chest will hold. Toys, crafts and heart pillows are a few ideas.

Bravery Chests themselves must be wooden, white or clear. The Bravery Chest must have the designated Bravery Chest logo, which can be found in the coordinators portal of the MLH website. You can also add your chapter’s MLH logo and website address. Please remember Bravery Chests need to be kept filled, so we recommenddesignating a particular person with that task.

**9 Social Media and Online Activities**

MH and MLH social media policies and branding guidelines must be followed when creating and using social media pages, sites and forums. All posts must be professional and supportive. No political, religious or controversial posts may be made on a MLH social media site except that prayer requests may be made IF the person or family it is made for has given approval first.

**9.1 Connections in a Heartbeat**

Mended Hearts and Mended Little Hearts hosts an online forum discussion group that is open to any heart patient, family member, or caregiver. On this moderated discussion board, individuals can find support, ask questions, or share experiences. The discussion board can be found at https://connect.mendedhearts.org/

**9.2 Facebook Coordinator Portal**

In addition to maintaining a national Facebook page, MLH also maintains a Coordinators’ Facebook page. This is a closed page that only the national leaders, ARDs and coordinators can access. It is the ideal place to ask questions or post concerns. If you are not already a member, please request to be a member of the MLH Coordinators’ Facebook Page.

**9.3 Chapter Facebook Pages**

In addition, most of our chapters have chapter Facebook pages, both closed and open.

The closed chapter should be a forum for local people and members who are heart families or patients. This is a forum where they can share freely about concerns, fears, questions, and accomplishments. Local and national events should be promoted here.
as well. In addition, if there are important posts on the national Facebook page, they can be shared here.

The chapter’s open Facebook page should be used to promote local and national MH and MLH events, engage people both inside and outside of the MH and MLH chapter, and thank organizations that donate and sponsor your chapter (tag them if possible). This page is open to anyone who would like to follow it.

If you are a new chapter, ARDs or RDs will help you set up an open and closed Facebook page. Please add your ARD as an administrator on ALL chapter page and Facebook chapters. If you do not have an ARD, add national MLH staff. We also require that the profile pages of chapter Facebook and other social media sites contain the chapter’s MH and/or MLH logo and full name so that they are easily identifiable.

Since every chapter is part of the National organization, chapters must repost and share information that is on the MLH national Facebook and Twitter pages as appropriate and where it fits with their posting schedule. National will try to keep you informed, in advance, of all major MH and MLH events so you can be prepared. We also ask that you do not post or share fundraising events of any kind that are not MLH fundraising events. We know sometimes patients and families are in need, family fundraisers cannot be promoted by MH and/or MLH chapters because it can make members feel uncomfortable and it cannot be done fairly for all.

9.4 Social Media Policy

Purpose of Policy

Mended Hearts and Mended Little Hearts (MHI & MLH) believe that social media can and should be used as a business tool for outreach, networking, connecting members, and general exposure to the public, friends, and family. MHI &MLH also believes that each employee and leader of the organization must recognize and exhibit professional responsibility for their actions while using any Mended Little Hearts social media sites, pages and forums.

Social Media Defined

For the purpose of this policy, social media includes all forms of electronic communication through which users create online communities to share information, ideas, personal messages, and other content (such as photos and videos). The policy extends to forms of social media not explicitly mentioned in this document as well.

Social Media Policy

The following is the MHI & MLH Social Media Policy for all employees and local, regional and national leaders. Where no policy or guideline exists, employees and leaders should use their professional judgment and take the most prudent action
possible. Consult with the national office (1-888-HEART99) if you are uncertain how a possible action may be interpreted. On ALL Mended Hearts and Mended Little Hearts social media sites:

1. Understand that your online presence reflects MHI & MLH, whether intended or not. Show respect to the organization, its employees, members, partners, sponsors and competitors in your social media presence.

2. Create a policy of support, kindness and respect on all Mended Little Hearts social media forum. Members mistreating others or making comments that are hurtful to others need to be addressed privately. Get the national organization involved if the problem persists. If necessary, as a last resort, MH/MLH leaders may remove members from social media forums.

3. Report any problems you see on any Mended Hearts or Mended Little Hearts social media pages, sites or forums as soon as possible.

4. Respect privacy rights of others as you post in social media forums. Get written permission before sharing personal information.

5. Do not make posts or comments that may be considered obscene, threatening, defamatory, libelous, harassing or embarrassing to others.

6. Be aware that actions captured via images, posts, photos or comments reflect that of the organization.

7. Respect copyright laws, and reference or cite sources appropriately. Plagiarism applies online for both business and non-business uses online. When using images, be sure to use only purchased images or images you have permission to use.

8. Do not reference or cite MHI and/or MLH partners, vendors or members without their express consent. All engagement with any of the above listed entities on social media forums must be respectful.

9. All MHI and MLH group social media sites MUST be moderated and content that does not comply with MHI and MLH social media policy must be deleted. Report problems to ARDs and the national office. ARDs must be an admin on all chapter social media pages, groups and sites.

Obviously, your personal social media pages and sites belong to you for you to reflect personal views and opinions. However, since both business and non-business messages, comments, photos and other actions can represent MHI & MLH, whether intended or not, MHI & MLH asks that you use common sense and professional judgment when engaging in social media activities. Please take into account that people are looking at you as a Mended Hearts or Mended Little Hearts leader, even on your personal pages and sites. In addition, if posts or images on personal pages are brought to the attention of the national staff or leadership, we may be required to consult with you.
10 Logos and Branding

As part of our ongoing effort to market and brand our chapters as part of a united, national organization, chapters must follow all branding guidelines and the Style Guide in the Officer and/or Coordinators' Portal.

Use only approved logos for shirts and other merchandise. Any items that a chapter creates on its own (pamphlets, flyers, displays, merchandise, etc.) must be approved by national and must contain either the national MH and/or MLH logo or the approved chapter logo. If there is a unique circumstance, and an item is created that doesn’t have a logo, the item must be approved by national. If a chapter would like a new logo approved, they need to receive permission from the national resource center.

All approved logos can be found in the officer/coordinator’s portal of the MH website. These approved logos can be modified in the following ways.

- The national logo can be replaced with the approved chapter logo.
- Color changes for logos can be made in accordance with the MLH style guide (found in the coordinators portal on the MLH website)

Mended Hearts and Mended Little Hearts reserves the right to all logos and use of the logo. No individual or corporation (other than Mended Hearts or Mended Little Hearts) may use the logo to their financial benefit.

11 Membership Information

When people join Mended Hearts or Mended Little Hearts by filling out a membership application on the national website, the chapter officer or lead coordinator will get an email notifying the chapter that a new member has joined with that member’s contact information. Please contact all new members as quickly as possible. The new member will also go into your chapter’s roster that is kept for you in the national database. New members receive a membership card. MH and MLH follow HIPAA privacy rules and ALWAYS protect membership information. MH and MLH do not give out any member information without their express written consent.

Members of all levels receive benefits of the organization and it is the policy of Mended Hearts and Mended Little Hearts not to discriminate against any member based on religion, race, sexual orientation, socio-economic status, disability, or age.

- It is helpful to have a process for welcoming new members to your chapter that includes announcing them by email and on social media to the rest of the chapter (if they give permission).
- Please ask all members to fill out a membership application on the national website, if they haven’t done so already, or get the information to fill it out for them. This way, they will be placed on your chapter roster that national
maintains for you, and they will receive communications from national about events and programs.

- Membership data must be kept confidential by leaders and may not be given to any other organization for any reason.
- Membership contact information may not be used for selling products and services other than MH and/or MLH merchandise.
- Always welcome all members to participate in projects and committees. They will get the experience of working with the leadership and the chapter can use the extra help. Welcoming new members with fresh ideas will help your chapter to grow, evolve and appear welcoming.
- If you have a patient or family that lives close to another MH or MLH chapter in your area, refer that patient or family with confidence and provide the officer/lead coordinator’s name and information.

12 Managing Chapter Finances: Financial Information for Chapters

12.1 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 chapters are not to incorporate at any time, as they are considered units of the national organization.

12.2 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. Determination letters from the Office of the Commissioner of Internal Revenue dated April 11, 1956, October 20, 1970 and most recently January 2006, established this exemption. 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.

Chapters that do not comply with the Chapter 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 MLH chapters) qualify as a deduction by the donors when computing their taxable income. It is often very helpful to give donors a receipt that includes your chapter's EIN number and the amount donated. There is a sample in the appendices. (Appendix G)

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 your chapter reimbursed you, the expense cannot qualify as a tax deduction. In addition, the meeting, workshop, etc. attended MUST be for the benefit of your chapter or to help you lead the chapter 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.

12.3 Sales Tax Exemption

MH and/or MLH chapters should obtain sales tax exemption, where possible, 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 chapter’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.
12.4 Non-profit Organization Bulk Mailing Permit

Chapters with chapter exemption status under the IRS are eligible for third class bulk mailing rates under the following provisions of the U.S. Postal Service (623.DMM). The chapter is 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.

Chapters 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.

12.5 General Information for Chapter Treasurers

It is very easy for chapter finances to fall under scrutiny by chapter members and by those outside of the chapter. For this reason, MH and MLH has strict policies for managing a chapter treasury that chapters should adhere to for their own benefit as well as the benefit of the MH and MLH organization.

12.6 Bank Accounts

Chapters should open a bank account as soon as possible after obtaining their Employers 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, which lists the officers. Most banks require a president and treasurer listed on the minutes. If you need a letter from the national office, one will be provided for you.

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

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

The chapter voting leadership must approve expenditures over $100. This will ensure that the chapter is on the same page in terms of spending. For example, if the chapter...
wants to purchase an item costing over $100, the leadership should all approve that expense. Approval might be required from additional team leaders as well depending on the chapter’s voting leadership team.

12.7 Keeping Records

The chapter treasurer must keep careful records of chapter finances including:

- Obtain copies (or print them) of all bank statements. Bank statements should be shared with chapter leadership (all chapter 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 MH and/or MLH purchases (and have other MH and/or 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.
- MH and 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.

12.8 Creating a budget

As soon as possible after the chapter is formed, you will want to create a budget for the chapter. First, it will be necessary for the chapter leadership to determine what the chapter would like to accomplish; it’s mission and related priorities. Next, the leadership will want to determine the cost for each priority. Of course, the first year your chapter is in existence, it will be hard to determine many of these numbers (how much things cost), but you can ask other chapters (through the coordinators Facebook page) about costs associated with many things.

**Chapter 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**

**Awareness**
- Printing Awareness brochures $ 150.00
- Hosting 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**
Bravery Bags* (These cost about $35 each unless items donated.) $35.00
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 an officer/coordinator to leadership training at MH Conference $800.00

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

Total $2,970.00

*For Mended Little Heart Chapters

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

13 Fundraising

Your chapter will want to do some kind of fundraising so that you have money to have events and to support others. Initially, this may consist of talking to organizations and chapters outside of the organization about Mended Hearts or Mended Little Hearts, and this will often result in some donations to your chapter.

Chapters may engage in fundraising activities that are designed to raise funds in the amounts needed for normal chapter operating and educational expenses, including expenses to send members to annual meetings (leadership training conference), regional workshops, and for MH/MLH-related purposes. See some fundraising ideas listed on pages 37-43.

13.1 Fundraising Guidelines and Policies

- MH/MLH leaders must use MH/MLH funds in a manner that is beneficial to the MH/MLH chapter and the national organization. Misuse of chapter funds will be addressed immediately, and actions taken, if necessary. Non-profits often fall under strict scrutiny, and policies regarding chapter funds will be strictly enforced. Similarly, MH/MLH national will provide chapter leaders with the MH/MLH program budget with clear explanations annually, and Mended Hearts submits itself to a voluntary annual audit as well. In addition, all funds donated
to MH/MLH will go directly to the MH/MLH program including funding from national fundraising campaigns.

- When creating print materials for fundraising, be sure to get approval from the national leadership (ARD, RD, Field Services manager) prior to 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 HeartGuide, printed materials, national leadership training conference, CHD Symposium or Bravery Bag Program.

- 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 Bravery Bags, it must be used for that purpose only). “Unrestricted” funds are donations made to your chapter for no specified purpose; they may be used for general operations or for a purpose determined by the chapter.

- MH/MLH National will provide chapter leaders with its budget with clear explanations for each item. Chapter leaders have a right to know what monies are coming in and where they are being used. If there is any question regarding finances, please contact your ARD and national office.

- MH/MLH funds must be used only for local and national MH/MLH programs, events, and awareness activities, for national MH/MLH training and conferences, for their local hospital(s), and for charitable Foundations that support their local hospital. MH/MLH funds are raised to support MH/MLH and its programs and giving donations to other organizations can prevent MH/MLH from offering and funding its important programs and services. Similarly, other CVD and CHD non-profits such as ACHA, CHF, PCHA and AHA do not raise funds to donate to MH/MLH. They all have their own fundraising activities that support their own national organizations and priorities. Previously, MH/MLH has been very permissive with chapter funds, and this has resulted in many questions about use of MH/MLH funds and an inability to fund MH/MLH programs year after year. For donations to local hospitals, the donations must be for support and education of patients and families or to help create awareness. For example, MLH could donate items to waiting rooms or other parts of the hospital but not to a specific research project. A Foundation (also a charitable foundation) is a legal category of nonprofit organization that will typically either donate funds and support to other organizations, or provide the source of funding for its own charitable purposes. Chapters may contact the national office if they would like to get something approved that may not fall within these guidelines or if they have any questions.

- Fundraising cannot be done to specifically benefit a particular patient or family. For example, your chapter cannot have a fundraiser for the Jones family. MH and MLH members could attend or help with a fundraiser for a family, but the fundraiser cannot be sponsored or hosted by the chapter. As the need for
financial assistance is so great, and the ability to identify the person(s) most in need is so difficult, chapters may not provide any direct financial assistance to families. If asked, you can be clear that we are glad to give emotional support, but we do not have the resources to provide financial support to all families in need.

- All the chapter’s officers and coordinators should make decisions regarding any proceeds from fundraising activities.

- Funds raised using the MH/MLH chapter EIN or the national 501(c)(3) belong to Mended Hearts or the Mended Little Hearts Program and not to the individual chapter. Similarly, purchases made using chapter funds are the property of the MH and the MLH Program.

- Chapters 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.

- Chapters may have joint fundraisers with other organizations so long as it is approved by their ARD and the terms regarding roles each organization will play for the fundraiser and the manner in which the funds will be divided are CLEARLY defined in writing. MH/MLH chapters may not conduct a fundraiser for another organization; however, they may have a table or other visibility at other fundraisers such as walks to raise awareness of MLH.

14 Fundraising Ideas and Tips

Fundraising is rewarding and instrumental work. It takes communication, organization, skill and most of all passion. The work that we do in MH/MLH is crucial to the success of our patients and families, and we need the funds to do this work. Monies are needed for tangible things like HeartGuides and 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 do not seem as tangible but are JUST AS IMPORTANT! No one would argue that education is not 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 patients and families expect us to be a knowledgeable, practiced support chapter 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.
The biggest way to succeed in fundraising is sharing your own story. Craft a brief yet impactful synopsis of your story or your child’s story that you can share anywhere, in an elevator, coffee shop, gas station, etc. It should consist of just a few sentences of you/your child’s medical experience and prognosis for the future, and a fact about CVD/CHD. 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 or 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” does not mean MH/MLH is unworthy or unimportant. That “no” might be a “not right now, but at a later time.”

This document has ideas chapters can use for fundraising that have been used by our chapters 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 you would like to submit a joint local and national grant, let us know so we can help.

14.1 Ideas to Get Fundraising 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 MH/MLH. Ask your potential donor what interests them. Here are some examples.
  - Donor interested in medical research and education? Ask them to help fund educational meetings or fund advocacy for your chapter. (This includes the travel to get to D.C. to do the work of advocacy)
  - Donor interested in taking care of families in the hospital? Ask them to provide funding for Bravery Bags
  - Donor interested in creating fun times for patients or families? Ask them to fund a social!
  - Donor interested in MH/MLH maintaining its solid reputation in the community? Ask them to fund education for its leaders. Officer and Coordinator education is CRUCIAL to continuing and developing our strong reputation among our families and our hospitals.

- Special projects that your chapter 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 you should avoid applying for grants, but know that they require a lot of work and you will get more “no’s” than “yeses.” Again, please advise the national office if you are applying for a grant.
• Decide how much money your chapter needs to operate effectively or for the project you need funded. This includes in-kind donations, like items for Bravery Bags. 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, former VP of MLH, 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 chapter 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 patients and CHD parents might have a hard time finding the time to seek donations or are unable to give to the chapter themselves, but friends, grandparents and other relatives can often help get donations, and they sometimes like to donate to help the chapter.

• 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 MH/MLH email list members!

• If you need help and advice, please post on our coordinator Facebook chapter. Probably others have done similar fundraisers.

14.2 Fundraising Tried and True Ideas

There are many ways of raising funds for MH/MLH chapters. 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 CVD/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. Again, clearly define (in writing) roles and division of funds ahead of time to avoid problems later.

- Read your local newspaper or check out radio station web sites. There are chapters that are already fundraising. See what’s going on and contact these organizations to see if MH/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.

**Partnering with Businesses**

- Many restaurants will give MH/MLH a percentage of their profits for all sales for a period. For example, there are restaurants that will have a night where a certain percentage of sales, no lower than 10% for that night, go to the MLH chapter. The MH/MLH chapter is responsible for getting the word out and bringing people in so they can get as much money as possible.

Some examples are:

- Chick Fil A
- Beef O’Brady’s
- Pizza Hut
- Bruster’s Ice Cream
- Max & Erma’s
- Rib Crib
- Culvers
- Applebees
- Chili’s
- Noodles & Company

- Grocery stores, 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 chapters 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 MH/MLH

**Partnering with Local Foundations**

It can be very helpful to work with other organizations that support CVD/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.
T-Shirt Sales

MH/MLH National has pre-designed T-shirts to sell. Chapters can use Booster.com to manage the entire sale and payments or chapters can sell them on their own. If chapters choose to design their own shirt. For MLH there is a list of approved shirt designs in the coordinator’s portal of the MLH website. To assure that they comply with branding requirements and logo standards, the ARD and/or RD must approve all MH shirts. All MLH shirt designs must be approved by Mandy Sandkuhler, Communications Manager and must follow all branding guidelines and logo requirements previously described.

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 or In-kind Donations

It can often be easier to get companies to donate gift cards or merchandise to your chapter 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.

Intermediate Ideas

- Selling Products—Product sales can be a good source of income for chapters. When figuring out what products to sell, you may want to determine:
- What is likely to sell? Talk to other chapter 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 chapter 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 chapter members have any connections.
- Some common items that chapters 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 chapter is ready to handle. New chapters may want to start small and increase in size as their membership and resources grow.

Advanced Ideas

These more complex events will take more time. It is highly recommended 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 chapters.

• Poker Run (motorcycle drive)—this can be a larger, more involved event.
• Golf tournament—there is a lot involved in having one. Talk to a chapter (like Central Virginia or San Antonio) 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.
• Garden Tour
• Auction—If you choose to do an auction, the Coloring Heart with Hope Auction materials, designs and project plan are already created for you. 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.
• Raffle—You can do this in conjunction with another event. You will need to collect 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, so you might contact the national office for ideas.

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 chapter 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 chapter members in your grant request. 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 chapter, 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 and Children’s Product Companies

15 Bonding

Chapters with funds with a balance at the end of the calendar year of five thousand dollars ($5,000) or more must bond the treasurer and all signatories on checking and savings accounts and submit a copy of such bond to the Mended Hearts National Resource Center, Merry Acres Executive Building, 1500 Dawson Road, Albany, GA 31707. The national resource center can obtain bonding for you at a reasonable rate, if so desired. 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.

16 Annual Review of Chapter Finances

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

Your chapter will be required to fill out an annual report each year and send a copy (electronically) to the national office. These reports are mandatory, required by the IRS and necessary to complete the national audit. If you need help filling out your annual report, don’t hesitate to contact the national resource center. Please keep a copy of your chapter’s annual report for your records. This information will also be helpful for your chapter’s own fundraising efforts.

Forms are emailed to each chapter officer/lead coordinator to share with other chapter leaders and the treasurer for review before filling out the report online. A copy of this report is also on the national Web site in the officers’ or coordinators’ section.

17.1 Preparation of Reports

Mended Hearts has provided an online system for chapters to file annual reports. This is designed to make it easy. Please remember, as with anything online, you will want to save your work and keep a copy.

Here are some other things to remember:

- Your chapter should be keeping accurate financial records. If you don’t know an exact amount, please refer to your records and get as close as possible. Sometimes, things are purchased for more than one purpose, but try to separate them to the best of your ability.
- There should be very few administrative expenses for your chapter. While purchasing any needed office supplies would be administrative, printing and shipping items is not when it involves chapter activities.
- Disbursements for operational/administrative purposes might include:
  1. Office supplies
  2. Paper for printing
  3. Stationery
  4. Thumb drives and other computer storage devices.

NOTE: The Mended Hearts, Inc. is responsible for the actions of all its chapters; therefore, strict compliance with all policies and Bylaws regarding MH & MLH chapter funds is required.

18 Membership/Annual Dues

Mended Hearts and Mended Little Hearts can now choose their level of membership. Each membership level has ways to engage with Mended Hearts and Mended Little Hearts and participate in the Hope, Help, and Healing these programs provide to those of all ages impacted by heart disease and congenital heart defects/disease.
Membership Levels:

All membership levels are for ONE YEAR and are renewed annually, except for the Heart of Gold Lifetime Sponsorship.

Associate membership (free - no cost)
- Can attend any chapter meeting for MH or MLH
- Can join online communities
- Can access Member Portal
- Receives the National News e-newsletter

Full Individual membership ($20 annual donation)
All of the above, PLUS
- Membership card
- Car decal (MH or MLH)
- 5% off (one time) of merchandise from the MH & MLH online store
- One-year annual subscription to Heartbeat magazine ($30 value)
- If you already paid dues, you can renew at this level once your current membership expires.

Family membership ($40 donation annually for members of one household with one mailing address only)
- Same as the Full membership PLUS
- receive another car decal of their choice and
- Membership cards for all members of the family.
- Each family member would receive the 5% (one-time) offer, but they can only use one discount per order.

Bronze membership ($45 annual donation per individual or $75 donation per family)
Same benefits as full individual or family membership PLUS
- Membership pin
- Choice of Drawstring Backpack or Mended Hearts/Mended Little Hearts notecards (one pack of 10)
- 5% off registration of any National (not regional) MH or MLH conferences and/or Symposia

Silver Membership ($100 annual donation per individual)
- All the Bronze Membership benefits PLUS
- a Stainless Travel Mug

Gold Membership ($250 annual donation per individual)
- All the Silver Membership benefits PLUS
- A red fleece blanket
- 10% off registration at National conferences and CHD Symposia

Heart of Gold Lifetime Sponsor ($1500 one-time donation per individual)
- All the above benefits for life, PLUS
- 15% off registration fees at National MH/MLH conferences and/or Symposia
- Recognition in the next Heartbeat magazine after enrolling in the Heart of Gold Lifetime sponsorship, in all special Heartbeat issues, and on our website’s list of Heart of Gold Lifetime Sponsors
19 Procedures for Chapters Needing Assistance and Disbanding Chapters

Chapter Needying Assistance: Sometimes chapters are struggling to find people to step into leadership roles and to grow their chapter. Chapter leaders who need assistance with any of the above requirements should contact their ARD or RD. The ARDs, RDs, national volunteers, and national staff will work with your chapter to help you.

Chapters Not Responding After Multiple Requests: It is important to have good communication with MH/MLH leaders, and repeated failure to respond to communications from ARDs and/or RDs is unacceptable and prevents MH/MLH from operating as a cohesive and strong national organization. Chapters who do not respond to ARDs and/or RDs after multiple attempts to be reached will be given a warning and a timeline for responsiveness. If the deadlines pass, and there is still no response from the chapter leadership, the chapter will be asked to attend a mandatory conference call with the ARD, RD and MH/MLH Leadership. The chapter will then be placed on a three-month probationary period. Failure to comply with any of these requirements and continued non-responsiveness will begin the chapter disbandment process.

19.1 Officer/Coordinator Resignations

Sometimes, chapter leaders decide they cannot continue to lead their MH/MLH chapter or want to leave for other reasons. Mended Hearts and Mended Little Hearts always appreciates its volunteer leaders and their service to the organization.

If an individual leader no longer wishes to lead, he or she must:

1) Notify his or her fellow chapter leaders in writing immediately to give them notice that they need to find a replacement. Ideally, a replacement would be identified with time for the transition in leadership to take place before the leader resigns.

2) Notify his or her ARD, RD and the national office.

3) Remove himself or herself from all accounts, including social media accounts. As your RD is required to be an Admin, he or she will be able to help you, if needed.

4) Remove himself or herself from the coordinator Facebook page.

5) Immediately turn in any receipts due reimbursement to fellow chapter leaders.

6) As quickly as possible, turn over any chapter property, merchandise or materials to his or her fellow chapter leaders.
7) If the leader is a signatory on the bank account, remove himself or herself from that account as soon as possible.

8) Give any funds outstanding in his or her possession to the Treasurer or other chapter leaders. Be sure to get a receipt when turning over funds.

9) The fellow chapter leaders can work with national to send out a notice to chapter members to see if anyone would like to step into the vacant position. If necessary, the MH and/or MLH RD will help the chapter as well.

19.2 Disbanding Chapters & Removing Officers or Coordinators

If all leaders of a MH/MLH chapter decide to disband the chapter for any reason, National must be notified immediately and BEFORE any disbanding or dissolution takes place or any communications go out regarding disbanding. Communications should come from the national organization only so it can manage the disbanding process.

Also, while Mended Hearts or Mended Little Hearts has no desire to involuntarily disband chapters, occasionally this may be necessary to ensure that patients and families needing support get that support.

The following is the process that must be followed for chapter disbanding, either voluntary or involuntary, or the requirements for all leaders:

1) After being notified of wish to disband by chapter leaders or of a chapter needing to be disbanded by the ARD or RD, National will send out an email to chapter members and post on the chapter’s closed Facebook page asking if anyone else would like to step into a leadership role. Often, there are people willing to step up. If no one steps up, national will begin the disbanding process.

2) While still a MH/MLH leader, exiting leaders must continue to represent MH/MLH and act in the best interest of the MH/MLH organization.

3) ALL social media accounts must be turned over to national immediately so national has access as an admin on those accounts. If the acting ARD or RD is an admin on the social media accounts, that is sufficient. No leader may change the name or branding on any MH or MLH social media account.

4) All merchandise and marketing materials, including Bravery Bags, given to the MH/MLH chapter or bought with MH/MLH funds are the property of MH/MLH and must be sent back to the national office as soon as possible. Merchandise may be given to other MH/MLH chapters at no charge to that chapter or national.

5) All funds must be sent to the national office and any bank accounts must be closed. Funds raised as MH/MLH using the MH/MLH EIN belong to MH/MLH, and MH/MLH leaders must be good stewards of that money and follow all current
MH/MLH policies regarding spending and donating funds. National will hold chapter funds in escrow for a period of two-years. In the event a chapter would like to be re-established in that area and meets chapter requirements, the funds will be returned to the chapter. If a new chapter forms, funds will be provided to that new chapter. If no new chapter forms after a two-year period, National will retain those funds for the national MH/MLH program.

6) Bank statements that were not already sent with the Annual Report must be sent to national.

7) All MH/MLH chapter email accounts with passwords must be given to the national office.

8) Leaders of disbanding chapters may not keep or use chapter members’ contact information in any way.

9) The exiting leaders must remove themselves from the MLH Coordinator FB page, any Mended Hearts Facebook pages and any Regional Pages.

10) The chapter’s Annual Report must be filed for IRS and audit purposes. Because the chapter was under the Mended Hearts 501(c)3, it must be included in reporting.

11) The chapter will be removed from the national website.

12) Access to the Officer/Coordinator Portal on the national website will be removed.

13) Members of the disbanded chapter will be notified of the disbandment via email. The formal notification to the chapter members will include ARD and/or RD contact info should another member of this chapter be interested in taking over in the future.
20 **Alcohol Policy**

20.1 **Purchase of Alcohol**

No alcohol may be purchased with MH or MLH funds. If you are having an event involving alcohol like a gala or auction, alcohol may be donated to the chapter or paid for as a donation to the chapter. If you ask for a donation of alcohol from a company that makes you purchase it first and then reimburses you, you may do that since the chapter funds will be reimbursed and not spent on alcohol.

20.2 **Serving Alcohol and Events with Alcohol**

MH and MLH members or leaders may not serve alcohol at any MH/MLH event unless they are a licensed bartender and are licensed to serve at that specific event. We would never want someone to leave a MH/MLH event after drinking and hurt someone or themselves.
APPENDIX A-1

SAMPLE MH INVITATION TO CHARTER MEETING

Inspecting hope and improving the quality of life of heart patients and their families through ongoing peer-to-peer support, education, and advocacy.

Dear (Name),

Our hospital is helping to start 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 and patient education. Mended Hearts has been offering the gift of hope to heart patients, their families and caregivers since 1951. Recognized for its role in facilitating a positive patient-care experience, Mended Hearts partners with about 460 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 educational conferences and meeting to train volunteers and provide 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:

Where:
When:
Why: To learn more about Mended Hearts

For further information or questions, please contact ______ at phone: ___________________

Best regards,

Name
Chapter Name
APPENDIX A-2

SAMPLE MLH INVITATION TO CHARTER MEETING

Inspiring hope and improving the quality of life of heart patients and their families through ongoing peer-to-peer support, education, and advocacy.

Dear (Name),

Our hospital is helping to starting a new Mended Little Hearts chapter to meet at _____________________. As parents and family members of children with congenital heart defects/disease (CHD) and patients with CHD, we are inviting you to an informational meeting to learn more about Mended Little Hearts and its services to support families through peer to peer support and education. Mended Little Hearts is a program of The Mended Hearts, Inc. that has been offering the gift of hope to heart patients, their families and caregivers since 1951. Recognized for its role in facilitating a positive patient-care experience, Mended Hearts and Mended Little Hearts partner with about 460 hospitals and rehabilitation clinics across the country and offers services through visiting programs, support group meetings and educational forums. The 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 Little Hearts is made up of the very kinds of people it serves – parents, family members and patients affected by CHD, its members draw on personal experience as they help others. Mended Little Hearts support groups help people understand that CHD doesn’t have to define them; their family can thrive after a CHD diagnosis. Members listen, share their experiences, learn from healthcare professionals and volunteer to talk to other CHD parents and families about what they may face including lifestyle changes, anxiety, depression, recovery, and treatment. Annually, Mended Hearts and Mended Little Hearts volunteers make an average 200,000 visits to patients and families in hospitals, online and by phone.

We invite you to join Mended Little Hearts and hear more about support services by attending our next support group meeting:

Where:
When:
Why: To learn more about Mended Little Hearts

For further information or questions, please contact ______ at phone: ___________________

Best regards,

Name
Chapter Name
APPENDIX B-1

SAMPLE MH LETTER TO HEALTHCARE PROFESSIONAL

Dear Health Care Professional,

We are excited to let you know about Mended Hearts, a nationwide program with a local community chapter in your area. Mended Hearts works to provide hope, help and healing to patients with heart disease, their caregivers and their families through peer-to-peer support and educational programs. Mended Hearts, Inc., is a volunteer-led, non-profit organization that has been providing support to heart patients and their families since 1951.

As medical professionals, you are providing an invaluable service to many patients who have been diagnosed with heart disease. However, despite receiving wonderful medical treatment, patients and caregivers often feel lost and alone when facing the difficult emotions involved in finding out they have heart disease. Mended Hearts chapters enhance the medical care these patients receive by providing emotional support through peer-to-peer interaction, educational programs, awareness activities, advocacy and hospital visiting.

Mended Hearts is a professional organization that works in conjunction with hospitals, doctors and medical facilities. We would like your support in working with this important chapter. Enclosed please find some information about Mended Hearts. If you would like more information or have any questions, please feel free to contact me. You can also visit our national website, www.mendedhearts.org.

Best regards,

(Name)
(Chapter Name)
(Email)
(Phone)
APPENDIX B-2

SAMPLE MLH LETTER TO HEALTHCARE PROFESSIONAL

Dear Health Care Professional,

We are excited to let you know about Mended Little Hearts, a nationwide program with a local community chapter in your area. Mended Little Hearts works to provide hope, help and healing to families and caregivers of children with heart defects through peer-to-peer support and educational programs. Mended Little Hearts is a program of The Mended Hearts, Inc., a non-profit organization that has been providing support to heart patients and their families since 1951.

As medical professionals, you are providing an invaluable service to many families whose children have been diagnosed with heart defects. However, despite receiving wonderful medical treatment, families often feel lost and alone when facing the devastation and difficult emotions involved in finding out their child has a heart defect. Mended Little Hearts chapters enhance the medical care these families receive by providing emotional support through peer-to-peer interaction, educational programs, awareness activities, advocacy and hospital visiting. In fact, many healthcare facilities already see the benefits of having a Mended Little Hearts chapter working with them to help families. Dr. John Kupferschmid of San Antonio stated, “MLH is vitally important to my practice. I see my patient as the extended family and not just the child. To care adequately for the child, you must meet the needs of the parents also. This is sometimes only possible with great families who have gone through similar experiences in their lives and who can and will share this journey with the parents of a child facing surgery.”

Mended Little Hearts is a professional organization that works in conjunction with hospitals, doctors and medical facilities. We would like your support in working with this important chapter. Enclosed please find some information about Mended Little Hearts. If you would like more information or have any questions, please feel free to contact me. You can also visit our national website, www.mendedlittlehearts.org.

Best regards,

(Name)
(Chapter Name)
(Email)
(Phone Number)
MEMORANDUM OF UNDERSTANDING

Mended Hearts Officers and Mended Little Hearts Leaders

The mission of The Mended Hearts, Inc. is “to inspire hope and improve the quality of life of heart patients and their families through on-going peer-to-peer support, education, and advocacy.”

One of Mended Hearts and Mended Little Hearts Strategic Plan goals is the following:

“Mended Hearts and Mended Little Hearts have a highly functional and clear internal structure that supports staff and volunteers in execution of the mission.”

In order to meet this important goal and support our leaders, there must be a clear understanding and expectations between our chapter leaders and the national organization. It is in this spirit that this Memorandum of Understanding was created.

The following items will be provided to our Mended Hearts and Mended Little Hearts chapters by the national organization:

- An EIN (or tax ID) number for the chapter that allows the chapter to function as a non-profit. Annual 990 e-postcards will be filed by national staff so long as the chapter is active to maintain the chapter’s non-profit status.
- A database for the MH/MLH chapter membership. The national organization is responsible for selection of an appropriate database, contracting with the vendor, all associated expenses with the database and database maintenance.
- Referral of people in the chapter’s local area who join the national organization via the website to the chapter leader.
- Marketing materials for the chapter including brochures, the Mended HeartGuide, the Mended Little HeartGuide Lites and postcards, and posters so the chapter can market and promote the chapter in their local area.
- A closed social media (currently Facebook) site for all Mended Hearts officers (for Mended Hearts) or Mended Little Hearts Coordinators (for Mended Little Hearts) to share ideas, ask questions, and discuss concerns. This forum will be maintained by the national office.
- As long as possible and dependent on funding, Bravery Bags, pens and wristbands for chapters to create Bravery Bags for their local hospitals.
• Ideas and help (where possible) with chapter fundraising.
• Accredited Visitor Training, including online training program, updates, maintenance and proof of completion, for all chapter leaders and chapter members who would like to be accredited visitors.
• Help in working with hospitals. The national organization will continue to work on developing relationships with hospital systems and developing materials for cardiologists and other doctors.
• Seeking national sponsorships to help fund Mended Hearts and Mended Little Hearts’ programs and services.
• Development of new programs to support patients and families affected by cardiovascular disease and congenital heart disease.
• Liability insurance that covers all “normal” chapter activities.
• Materials for chapter leaders. These materials help chapter leaders, so they do not have to “reinvent the wheel.”
• Filing taxes and paying state fees.
• Filing the national 990 to provide transparency to donors.
• An annual voluntary audit to ensure fiscal accountability.
• National staff support for chapter leaders.
• National Awareness campaigns with ways chapters can participate locally.
• Creating advocacy agendas and providing opportunities to advocate on issues.
• A chapter logo in formats for chapter use and printing.

By signing this agreement, chapter leaders agree they have read and will abide by all Mended Hearts/Mended Little Hearts policies and procedures set forth in the Policies and Procedures Manual and organization’s Bylaws.

I ______________________________ agree that I have read and will abide by Mended Hearts’ Policies and Procedures Manual and organization’s Bylaws. In addition, I agree to complete the Accredited Visitor Online Training within 60 days of becoming a chapter leader. I also agree to the following specific requirements that are highlighted in this agreement because of their importance:

1. **Treasury.** I will follow all treasury guidelines related to fundraising and accounting for Mended Hearts/Mended Little Hearts funds.
   a. I will establish and maintain a MH/MLH account that is separate from my personal bank account at all times without mixing them.
   b. I will provide all chapter-voting leaders with a monthly balance sheet that documents a starting balance, monthly income, expenses paid and an ending balance.
   c. I will not have anyone write checks to me personally—only to the MH/MLH chapter—and I will deposit all checks into the MH/MLH account within 20 days of receipt.
   d. Our MH/MLH chapter will have two signatories on its bank account(s) at all times, and these signatories will not be related to each other or live in the same household.
e. I will provide the national organization with all bank account information including bank name, account number, and signatories.

f. I will keep all receipts and designate what they were for and whether or not they were reimbursed with the date of payment.

g. With my chapter’s annual report, I will send in the chapter’s bank statements for that calendar year.

h. I will give my chapter leaders open access to bank statements and discussed chapter finances on a regular basis as a leadership team.

i. All large purchases (over $100) will be discussed with the entire leadership team before made.

j. For any fundraisers involving cash, all cash will be collected in a cash box. Two leaders will count the case at the end of the event and place it an envelope and seal the envelope. Both leaders will sign the outside of the envelope (over the flap) and make sure the amount inside the envelope is on the outside. This envelope will be given to the treasurer for deposit within 20 business days.

2. **Fundraising and Use of Funds.** I will follow ALL MH/MLH fundraising guidelines set forth in the Policies & Procedures Manual. All fundraising MUST support MH/MLH’s mission.
   
   • My MH/MLH chapter will not fundraise for any specific person or family.
   
   • I understand that other non-profit organizations do not fundraise for MH/MLH even though they may agree with our mission, so, likewise, I will not use MLH funds for any other organization except for MH/MLH itself, my local hospital(s), and any Foundations (Foundations are legal charitable entities) that directly support families in that hospital.
   
   • My chapter may have joint fundraisers with other non-profit organizations so long as they support the Mended Hearts mission and fund divisions are clearly laid out in writing.
   
   • If my chapter would like to have a fundraiser that may not fall within these guidelines, I will ask the national MH/MLH staff; these requests will be reviewed on a case-by-case basis. If I don’t agree with the review, I may ask that the Executive Committee discusses it and comes to a consensus. The goal is not to be punitive, but to make sure MH/MLH can fulfill its mission as an organization and in our local communities.

3. **National Events.** My chapter will participate in and promote all national events including, but not limited to national conferences, regional cluster meetings, CHD Symposium, Day of Giving, Helicopter Golf Ball Drop, Rock Your Scar, Roar ‘N Run, Remember Our Hearts, and the Bravery Bag Program (where possible). I understand that my chapter is part of a national organization, and our goal is to be a strong organization both locally and nationally. My chapter will post all national events at least two times on local social media forums.

4. **Branding.** I will comply with all branding guidelines set forth by Mended Hearts/Mended Little Hearts. I understand the importance of maintaining the national brand that everyone can easily recognize and that altering the logo or brand in any way takes away from its strength.
I create new materials or designs for my local Mended Hearts/Mended Little Hearts chapter events or use, I will have them approved by the national organization before production.

5. Social Media Policy. I will comply with the Mended Hearts Social Media Policy. I understand that, as a leader, I am seen as a representative of the organization and will conduct my social media use accordingly.
   • I will also monitor, or assign someone to monitor, all social media sites/pages for my chapter and make sure my chapter’s social media pages share information from the national organization.
   • I will not use the social media sites to promote or share any individual’s, family’s or other non-profit’s fundraisers unless it is also directly benefitting Mended Little Hearts (e.g., a joint hospital fundraiser, a joint fundraiser with another non-profit, etc.).
   • Also, because it is SO important to share accurate data, do not share facts, statistics or other research on your local page unless it was shared on the MLH National social media sites first or can be found at www.cdc.org or www.chphc.org.
   • I will use my local social media platforms to share MH/MLH national and local activities with my chapter’s members.
   • I will inform MH/MLH national of activities, accomplishments and news releases for my local chapter so they can share them on MH/MLH national venues where appropriate.

6. Accredited Visitor Training. I understand the importance of properly representing Mended Hearts and Mended Little Hearts with patients and families and healthcare professionals. Therefore, I will complete the Accredited Volunteer Training as required. My participation in this training can either be done in person at a Training Conference, or by participating in the online training course offered through the Officer/Coordinators’ Portal. I will keep and maintain a current Accredited Volunteer Training certification the entire time I am an active chapter leader.

7. Continuing Education: I understand the importance of keeping up with current activities, projects and campaigns of MH/MLH and well as the need for ongoing training to be the best volunteer leader possible. In order to keep up with the activities and expectations of me, I will participate in informative and educational webinars offered by MH and MLH, where possible, and training offered to me as a leader. If I am unable to participate for any reason, I understand it is my responsibility to contact my ARD or RD as soon as possible and make arrangements to get the information conveyed.

8. Local Leadership Participation: As a local leader of my chapter, I understand that my presence at leadership meetings and local events is important, and other leaders and members look to me to show that I value and support the other leaders and the local chapter.
   a. I will actively participate in my local officer/coordinate/leadership meetings, as well as my local chapters’ support meetings, programs and events when possible. I understand my presence is important to keep me active and involved in my local support chapter and community. If I am unable to attend a meeting or event, I will immediately inform my fellow leaders.
   b. If I am planning leadership meetings, I will make every effort to do so at a time convenient to most of the leadership team, understanding that it can be very difficult to
find a time that will suit everyone. I will also hold meetings in a location that is as convenient as possible to ALL of the leadership team.

c. I will strive to be inclusive and make sure everyone feels like a valuable part of the leadership team.
d. I will work as a team with my other leaders, not only on the local level, but on the National level as well. I understand that while I may be considered a local coordinator for my chapter, we are to work as a team on every level of MH/MLH in order to encourage and help ALL MH/MLH chapters succeed and promote a unified national brand of hope and support.

Also, the following Code of Conduct sets forth what you can expect from the national organization and what the national organization expects of you:

**Code of Conduct**

- I will, as a MH/MLH leader, act in the best interest of MH/MLH both local and national at all times.
- I will treat other Mended Hearts and Mended Little Hearts leaders (local and national), staff and members with kindness and respect at all times, even if we do not agree.
- I will support patients, parents, families and others who attend chapter activities whether I agree with them or not.
- I will always respect a patient, parent or family member’s choice of treatment for themselves or for their child.
- I will assume good intent when someone says or does something that seems unkind, and I will seek to clarify before jumping to conclusions. If I have a problem or concern with someone, I will go to them directly and seek to resolve it in person or by phone. If I cannot resolve it, I will first contact my Assistant Regional Director, Regional Director, and then national volunteers or staff for help.
- I will foster diversity in my MH/MLH chapter and in the organization.
- I will have an “open-door” policy so people can feel free to come to me with ideas, concerns and questions.
- I understand that all voting chapter leaders should be treated equally and have the right to be heard and respected.
- I will respond to email or phone communication from the national organization, my ARD, my RD and/or my chapter members as quickly as possible (within 72 hours but no later than 5 business days)
- I will communicate with my ARD, RD or the appropriate person if any personal issues arise preventing me from temporarily fulfilling my local leadership duties.
- I will try to participate in all educational and informative webinars/town halls hosted by MH/MLH National when given live (schedule permitting) or watch recorded version afterwards.
- I will conduct myself in a professional manner at all times when acting as chapter leader.
• When representing Mended Hearts/Mended Little Hearts in any capacity, I will not make statements or give opinions that are my own and not those of the Mended Hearts/Mended Little Hearts organization.

Failure to comply with any Mended Hearts and Mended Little Hearts policies except chapter financial issues will result in two warnings before further action is taken. If the violation is not corrected with two warnings, the chapter leader will be placed on probation or removed from leadership depending on the severity of the violation.

For chapter financial issues, immediate investigation will be conducted to protect our chapter leaders, other chapters and the organization. Keeping good records will help MH/MLH defend your chapter if the need arises, and by signing this agreement, you are agreeing to cooperate with any investigations. If funds are taken or misused, the parties involved will be immediately removed from leadership and funds must be reimbursed to the chapter or to the national organization. If funds are not returned, The Mended Hearts, Inc. reserves the right to file criminal and/or civil charges.

Chapter leaders ALWAYS have the right to discuss concerns or disagreement with policy and your thoughts will be considered and changes made, if necessary.

As always, we appreciate your willingness to volunteer for Mended Hearts and Mended Little Hearts. Your contributions mean so much to patients and families in crisis and in your community. We understand Mended Hearts and Mended Little Hearts leadership takes much work and effort, and it does not go unnoticed.

Agreed to and signed on this _____ day of _________________________, 201______________________________

_________________________________________ of

Mended Hearts/Mended Little Hearts Chapter Leader:

_________________________________________

Chapter Name: ________________________________________________________________

Executive Committee Representative: ____________________________________________
APPENDIX D

Chapter Information

Proposed Chapter Name: __________________________________________________________

- Mended Hearts chapters will have a chapter number and a name. The required naming method for Mended Hearts chapters is “Mended Hearts of (city or town).”
- The required naming method for Mended Little Hearts is “Mended Little Hearts of (city or town).” If there is more than one chapter in a city, an additional identifier may be added, such as the hospital served.
- Chapters may also create their own unique nickname for local use.
- City/Locality, State: __________________________________________________________

- This should be city where the chapter will either meet or perform most of its activity.

(NOTE: The following information will be posted on the Mended Little Hearts Web Site.)

1) Number of charter members:

_______ Heart Disease Patients  _______ Caregivers _______ People with CHD _______

____ Families  Medical Professionals ______Other

Total ______________

2) Where will monthly meetings be held? __________________________________________

Officer or Coordinator Information

Each Mended Hearts chapter must have at least four officers in place at the time they charter: The chapter president, vice president, secretary, and treasurer. The officers are the leaders of the Mended Hearts chapter. Every Mended Little Hearts chapter must have at least three coordinators in place at the time they charter. The coordinators are the leaders of the Mended Little Hearts chapter.
A. President or Lead Coordinator

Name: ________________________________________________________________

Address: ______________________________________________________________

City, State, Zip: _________________________________________________________

E-mail: ________________________________________________________________ Phone: ______________________

B. Vice President or Educational Coordinator

Name: ________________________________________________________________

Address: ______________________________________________________________

City, State, Zip: _________________________________________________________

E-mail: ________________________________________________________________ Phone: ______________________

If your chapter is going to visit patients in the hospital, or do phone or email visiting, you need to have an Visiting Chair (Mended Hearts) or Outreach or Visiting Coordinator (Mended Little Hearts) who is in charge of training hospital visitors.

C. Secretary (MH) / Visiting or Outreach Coordinator (MLH)

Name: ________________________________________________________________

Address: ______________________________________________________________

City, State, Zip: _________________________________________________________

E-mail: ________________________________________________________________ Phone: ______________________

C. Treasurer

Name: ________________________________________________________________

Address: ______________________________________________________________

City, State, Zip: _________________________________________________________

E-mail: ________________________________________________________________ Phone: ______________________
Other Information

1) Medical facilities performing heart procedures or offering heart related care (for MLIH, pediatric care):

<table>
<thead>
<tr>
<th>Name of Facility</th>
<th>City, State</th>
<th>Working with Chapter</th>
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</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Y □ N □</td>
</tr>
<tr>
<td></td>
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<td>Y □ N □</td>
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<td>Y □ N □</td>
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2) The hospital has agreed to provide the following support services (*check all that apply)*:

- [ ] Meeting Space
- [ ] Desk/Office
- [ ] Telephone
- [ ] Courtesy Parking
- [ ] ID Badges
- [ ] Patient Locator Services
- [ ] Discounts

3) Written or verbal agreement for visiting privileges received from:

- Cardiovascular Surgeons
  - [ ] Y □ N □
- Volunteer Department
  - [ ] Y □ N □
- Cardiologists
  - [ ] Y □ N □
- Other__________________________Y □ N □

- Will the proposed chapter be affiliated with an existing Mended Little Hearts chapter (for Mended Hearts) or Mended Hearts Chapter (for Mended Little Hearts)?  Y □ N □
- If so, what chapter:

  Name: _________________________________________________

  Number: __________

- What does the affiliation include (*list any financial contributions, office space, volunteer support, etc.*)?

  ______________________________________________________

- If available and appropriate for your chapter, American Heart Association will provide the following support services (*check all that apply)*:

  - [ ] Meeting Space
  - [ ] Desk/Office Space
Telephone
Funding
Newsletter Assistance
Printed Material

Other: ____________________________________________________________

• Date of charter meeting: ______________________________________

Officers’ or Coordinators’ Signatures:

Date: __________________________________________________________

President/Lead Coordinator: ______________________________________

Vice President/Education Coordinator: ______________________________

Secretary (MH): ________________________________________________

Visiting Training Coordinator (MLH): ______________________________

Treasurer: ________________________________
The undersigned, being members in good standing of Mended Hearts and/or Mended Little Hearts, and desiring to institute an accredited chapter thereof, hereby petition for a Chapter Charter. Please print name and contact information. Signature goes below each name.

Name of Chapter ________________________________

County _______________________________________

This petition shall also commit this chapter to abide by and to uphold the provisions as outlined in the Bylaws of The Mended Hearts, Inc.

<table>
<thead>
<tr>
<th>Name</th>
<th>Address</th>
<th>City</th>
<th>State</th>
<th>Zip</th>
<th>Telephone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Signature</td>
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APPENDIX F

SAMPLE CHARTER MEETING AGENDA

The following agenda is presented as a sample only. Local organizing chapters can and should create an agenda that best suits its needs and addresses the information that is needed. Ensure that local organizers have pre-printed Mended Hearts and/or Mended Little Hearts information, Charter Application, Charter Membership Forms and a list of volunteer opportunities available at the meeting.

1) **Welcome and Introductions**
   - Thank attendees for coming
   - Introduce chapter organizer(s) and any special guest(s) in attendance (for example, key hospital staff, doctors, and Mended Hearts or Mended Little Hearts representatives, etc.)

2) **Mended Hearts and Mended Little Hearts Information**
   - Provide basic history of MHI and MLH (can be done by a Mended Hearts or Mended Little Hearts representative)

3) **Mended Hearts and Mended Little Hearts Information**
   - Provide history of programs (can be done by a Mended Hearts or Mended Little Hearts representative or one of the chapter organizers)
   - Explain the goals of the forming chapter (should be done by a local chapter organizer)

4) **Hospital/Cardiologist Comments** *(If working with a particular hospital. If chapter is working with more than one hospital, each should be given equal time.)*
   - Hospital(s) or Cardiology Practice goals and desires for the new chapter

5) **Local Chapter Essentials**
   - Determine how local chapter will be structured and who will be President, officers or Chapter Coordinators.
   - Questions and Answers
   - Allow audience to pose questions about Mended Hearts, Mended Little Hearts, goals of the chapter, cooperation between chapter and hospital or cardiology practice, etc.

6) **Call to Action**
   - Request participants to sign Charter Petition and Membership Forms
• Encourage participants to:
  • Fill out membership forms online
  • Sign up for volunteer opportunities
  • Spread the word about Mended Hearts and Mended Little Hearts through their own contacts
• Accept donations if offered (Mended Hearts and Mended Little Hearts do not suggest asking for donations at this point; however you may want to discuss how important programs for the chapter might be funded.)

7) Set next meeting date, time, location and agenda.
APPENDIX G

SAMPLE MENDED HEARTS DONATION THANK-YOU LETTER

Please customize this letter and place on MH Letterhead (found in the officers’ portal).

Month Day, 2019

Address:

Dear ________:

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

As heart disease strikes 1 in 4 people in the U.S. and is the leading cause of death, many patients and their caregivers are faced with the difficult emotions and feelings involved in living with heart disease. While the medical advances associated with the treatment of heart-related illnesses continue to improve, the emotional aspects associated with heart disease often linger with patients and families longer than one anticipates.

Thanks to your support, Mended Hearts will offer valuable health information and patient-to-patient hope and encouragement. Please retain this letter as proof of your contribution for federal income tax purposes.

Sincerely,

(Name)

(Chapter Position)

(Chapter Name)

Contribution to: Mended Hearts (chapter name). Employer Federal ID # (put chapter EIN number here)
APPENDIX H

SAMPLE MENDED LITTLE HEARTS DONATION THANK - YOU LETTER

Please customize this letter and place on MLH Letterhead (found in the coordinators’ portal).

________________________________________

Month Day, 2019

Address:

Dear ________:

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

As congenital heart defects (CHDs) 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 CHD. While the medical advances associated with the treatment of heart-related illnesses continue to improve, the emotional aspects associated with CHD 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)

(Chapter Position)

(Chapter Name)

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

RECEIPT EXAMPLE

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

Receipt Example:

RECEIPT

Date______________ NO. XXXX

RECEIVED FROM

<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>