Regional Cluster Meeting Toolkit

Empower, Educate, Inspire

Regional Meetings

2019

Empowering heart disease patients across the lifespan.

www.mendedhearts.org
www.mendedlittlehearts.org
1-888-HEART99
Dear Regional Cluster Meeting Coordinator,

Congratulations on choosing to host a Mended Hearts and Mended Little Hearts Regional Cluster Meeting in your area! Few events are as powerful as this one for creating educational and awareness opportunities. This event also has the potential to bring new faces to your chapters.

This Regional Cluster Meeting includes BOTH Leadership Training for MH and MLH leaders AND a Patient and Family Symposium that is open to all members and to the public. This will be an exciting meeting building on the success of our Regional Conferences in 2016, as well as many of our cluster meetings and our CHD Symposium.

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

This toolkit contains:
- A detailed logistical plan
- Marketing tools
- An event timeline
- Suggested agendas
- A meeting packing list
- Roles and responsibilities
- A sponsorship packet
- A Regional Meeting flyer
- A Save the Date postcard

We hope you have everything you need to make this event truly memorable!

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

Heartfully,
Mended Hearts and Mended Little Hearts National Resource Team
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LOGISTICS

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

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

Event Location
There are a number of factors to take into account when considering location. Consider the locations’ convenience to large groups of people, how much parking it has, venue cost, and access to public transportation. The space also needs to be able to accommodate the amount of people you expect to attend. A local hospital may offer meeting space at no cost or very little cost. (They may offer to cover some food as well.) Alternatively, you may have a relationship with organizations aside from your local hospital that may be willing to host your event at little-to-no cost.

You will want to be sure that AV is available in the space you find and determine potential cost for AV. (It can get pricey.) In addition, be sure to go see potential meeting space to ensure there is good visibility to the speakers and enough room for participants to interact with each other. In addition, you will need hallway space or other space for registration and sponsors (and vendors, if desired).

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

**Registration**
There are different ways to manage registration:

- Our National Resource Center will set up registration for you, if you would like online registration. We will use Constant Contact as we do for other conferences.
- You can do your own registration online. If you chose to do your own online registration, please plan it carefully. Make sure you know who will be keeping track of registrations and communicating with registrants. You will also need some way of collecting registration fees and keeping track of them as well.
- If you want to register people in person at the event, designate the person responsible for registration and for collecting money. If you plan to take credit cards, you will need a device to read them at the event. If you choose to do this, you may not have a good idea as to how many people might show up, so it is not ideal for planning meals and conference materials.

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

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

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

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

You might also choose to sell some merchandise like t-shirts, water bottles, blankets, etc. at the event. This is a good way to make some extra money. You will want to be sure you have someone to work the table and sell these items and that you have money in your budget for them. You will also want to be sure to have a sign listing the items and the costs and a way to take payment, like a credit card machine (they make them for your phone) and cash box (with cash in there to make change). If you want to take credit card payments, you will need to look into options for that far in advance.
If you will have conference bags, be sure to include MH and MLH brochures, info about the chapters in the area, postcards about Bravery Bags (if applicable), handouts, and anything else conference attendees may need. Chapters may choose to purchase fun items like heart-shaped ice packs, cute MH or MLH pens, etc. to get the MH & MLH logo out there and to enhance the meeting bags.

**Food and Entertainment**

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

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

On Saturday, you will want to plan to provide lunch for participants. If your budget allows, you might also provide coffee and/or breakfast in the morning when participants get there. (Note: if you are not providing breakfast, please be sure to start a little later so people have time to have breakfast before the event.)

During both Leadership Training and the Patient and Family Symposium on Saturday, please be sure to provide water for participants. You might also choose to purchase mints or other items to put at tables. **Please always be aware of possible food allergies.**
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<thead>
<tr>
<th>Time</th>
<th>Organizational Task</th>
<th>Marketing Task</th>
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</table>
| 3 months before | ___ Create Conference Team  
___ Hold first meeting  
___ Reserve location  
___ Set date  
___ Create online registration  
___ Create budget  
___ Create agenda  
___ Check insurance  
___ Approach hospitals and companies for sponsorship  
___ Start volunteer recruiting  
___ Identify speakers | ___ Send out Save the Date  
___ Announce on social Media  
___ Create event on FB, Twitter, Instagram  
___ Add logo and event to your group’s website  
___ Promote on social media twice a month  
___ Put postcards & flyers in strategic locations |
| 2 months before | ___ Plan meals & make arrangements  
___ Reserve entertainment  
___ Continue to get sponsors  
___ Order banners and signs  
___ Order plaques for any awards or main sponsors  
___ Order t-shirts, bags & merchandise | ___ Promote on social media once a week  
___ Continue to put out flyers  
___ Contact local radio/news |
| 1 month before | ___ Create volunteer schedule  
___ Set event day schedule  
___ Confirm all speakers, music, and meals | ___ Send out press release to local media  
___ Promote on social media twice a week  
___ Promote on MH & MLH National social media |
| 2 weeks before | ___ Go over volunteer schedule with volunteer lead  
___ Prepare meeting bags  
___ Send email to volunteers | ___ Promote on social media Three times a week (be sure to mention sponsors) |
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<tr>
<th>Time</th>
<th>Organizational Task</th>
<th>Marketing Task</th>
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| Day before           | ___ Print registration forms  
                       ___ Print waivers for photos  
                       ___ Print registration lists  
                       ___ Pick up credit card device  
                       ___ Pick up donated food and beverage items  
                       ___ Walk through conference  
                       ___ Put up signs, if possible  
                       ___ Put any new bags together  | ___ Post on local and national social media sites |
| Day of               | (See Day of Schedule)                                                                | ___ Assigned people to post videos and pictures on social media throughout event |
| Very soon after      | ___ Thank volunteers via email  
                       ___ Thank conference attendees via email—include details and a picture  
                       ___ Thank all major sponsors with a thank-you note  
                       ___ Deposit all checks  
                       ___ Generate reports of Meeting proceeds  
                       ___ Hold debrief meeting  | ___ Post on social media thanking main sponsors again and thanking all who came to the meeting |
BUDGETING, FUNDRAISING, & SPONSORSHIPS

Budgeting
It is important to set your budget early in the planning stages. There are many possible costs that should be taken into consideration. You may be able to get many things donated or at a discount (don’t forget to ask). Here are some costs you may need to consider:

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

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

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

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

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

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

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

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

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

One of the most important parts of executing any big event is having an adequate number of volunteers. Below is a list of volunteer positions you may need and approximately how many of each you will need. (Note: You will want to get MORE volunteers than you need as some may fail to show on Regional Meeting day.)

After you have determined how many volunteers you will need, it’s time to figure out where to get them. You can ask people in your local chapters and hospitals. There are sites like Volunteer Match where you can ask for volunteers for specific events. Ask your members to check with their organizations and churches to see if they can gather volunteers for you. Kohl’s has supported several our chapters in the past by providing volunteers and sponsorship. Don’t be afraid to keep asking. It’s a great event.

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

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

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

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

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

Packing List for Meeting Day

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

If you provide an opportunity to sign up online before the Regional Meeting, you will want to close the registration the night before at the latest. You can determine if you will allow walk-up registrations. If so, you may want a separate walk-up registration table.

You will want to have some type of remote credit card system to accommodate walk-up registrants who do not have cash. It’s also good to have this in case you want to sell merchandise. Be sure to have waivers on hand at the registration table and back up registration forms.
Sample Schedule

Friday Afternoon, Leadership Training for MH & MLH Leaders

12:30 p.m.
- Chapter leaders and set-up volunteers arrive
- Set up for meeting, merchandise and registration

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

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

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

Saturday, Patient Symposium, Open to Public

8:00 a.m.
- Set up for patient Symposium

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

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

12:00 – 1:00 p.m.
- Lunch

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

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

Friday Afternoon

2:00 p.m.
• Welcome MH & MLH Leaders

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

2:45 p.m.
• Sharing Our Story

3:15 p.m.
• Break

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

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

4:45 p.m.
• Closing

5:00 p.m.
• Adjourn

5:15 p.m.
• Optional Reception

Saturday

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

9:30 a.m.
• Peer Support Programs—Success Stories
10:00 a.m.
- Communicating with Medical Professionals to Make Better Informed Decisions

10:30 a.m.
- Break

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

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

12:00 – 1:00 p.m.
- Lunch

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

1:30 p.m.
- Imaging and Monitoring Heart Patients of All Ages—What’s New?

2:00 p.m. Breakout Sessions
1. Diabetes and Heart Disease
2. CHD Treatment Innovations

2:45 p.m.
- Break

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

3:50 p.m.
- Close

4:00 p.m.
- Adjourn
Mended Hearts and Mended Little Hearts Patient and Family Symposium: Empowering Heart Patients of All Ages

City name - Date – Mended Hearts and Mended Little Hearts will be hosting a Patient and Family Symposium for patients with heart disease of all ages and their families on [date] as part of their Regional Cluster Meeting.

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

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

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

About Mended Hearts and Mended Little Hearts:

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

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

For more information please contact __________________________________.