



HEARTS AND HANDS MATCHING FUNDS PROGRAM

Policy and Procedures

Hearts and Hands is a matching funds program sponsored by 1891 Financial Life to support the fund raising efforts of our Courts / Impact Teams in their communities.

What kind of fund raising can we do?

Courts / Impact Teams have hosted a variety of different events such as bake sales, raffles, spaghetti dinners, and rummage sales. Events are subject to IRS rules, so please submit your fund raising idea 45 DAYS before the event, for Home Office approval.

Who can benefit from the funds?

Your school, parish, religious education program, library, local fire department, a family or an individual in need can be the beneficiary.

How do we get started?

Contact the outreach and engagement department for a Hearts and Hands application form. This form must be received by the Home Office 45 DAYS PRIOR to the event for approval. Continue planning your event, you will be immediately notified if there is any problem with your application.

A project summary form will be sent to you along with any support materials you may have requested. You may always contact the outreach and engagement department if you have any questions at (800) 344-6273.

How much of the funds raised will 1891 Financial Life match?

The maximum amount in matching funds per Court / Impact Team is \$1,500 per year. Courts / Impact Teams can hold multiple events to reach the \$1,500 yearly limit.

The amount of money matched by 1891 Financial Life depends on the sponsorship of the project:

- 1) **SOLE SPONSOR:** 1891 Financial Life will match funds up to \$1,500. The Court / Impact Team has all the major decision making responsibilities for the event. All publicity will show 1891 FINANCIAL LIFE as the only sponsor of the activity.
- 2) **CO-SPONSOR:** 1891 Financial Life will match funds up to \$750. The Court / Impact Team is working with another group or organization* but has no real decision making responsibility.

* PLEASE NOTE: CO-SPONSORS WITH ANOTHER FRATERNAL INSURANCE BENEFIT SOCIETY ARE NOT ELIGIBLE FOR ANY FUNDING.

Can we publicize our event?

YES! In fact, it is required to be eligible for funding. The Home Office will provide you with flyers (up to 50) and will send a press release out to your local newspaper with the information you provide.

We also suggest that you publicize in your parish bulletin, school newsletter, and anywhere in your community that will raise awareness for your event and cause. All communication regarding the event must be approved by the Home Office, so please send us a sample with your application 45 DAYS before the event.

Remember to include:

- our full name, "1891 Financial Life"
- the matching amount if you are a full sponsor, "1891 Financial Life will match up to \$1,500 of funds raised"
- or the matching amount if you are a co-sponsor, "1891 Financial Life will match up to \$750 of funds raised"

Proudly publicizing your event with the 1891 Financial Life name and logo increases our name recognition within communities and makes it possible for us to continue the wonderful fraternal programs like Hearts and Hands.

To whom can the matching funds check be made payable?

1891 Financial Life matching checks can be made out to a parish, Catholic school, religious education program, or a local community organization (e.g. fire department or food pantry). If the beneficiary is a family or individual in need, the check can be made payable to a bank trust, their local parish, or similar account established on their behalf.

Tips for a successful event.

- Plan ahead.
- Contact all your members for help.
- Publicize wherever possible.
- Plan an event that appeals to families: pancake breakfasts, spaghetti dinners, hay rides, family bingo night, etc.
- Be organized.
- Delegate responsibility to other members.
- Personally ask others to help with a specific task. Jesus recruited “face to face”, “heart to heart” — so must we.
- Solicit donated items (food, prizes) from local businesses.
- Think positive and enjoy yourself.

H&H Program Steps to follow . . .

- 1) Determine where there is a need in your community.
- 2) Decide on a project.
- 3) The application must be received by the outreach and engagement department 45 DAYS PRIOR to the event for approval.
- 4) Flyers and a press release must come from the Home Office. Contact the Home Office for assistance.
- 5) Host your event.
 - a) **If your event is a sole sponsor:** Deposit all proceeds into the Court / Impact Team treasury. Submit your summary form with original receipts for expense and original deposit slip(s) to the Home Office, Attn: Outreach and Engagement
 - b) **If your event is a co-sponsor:** Procure from the hosting organization a signed statement of the gross income, expenses, and net profit – or a copy of receipts for expenses and deposits. Also include a proof of receipt from the recipient of the event, with the dollar amount received – EX: a letter on letterhead. Submit this with your summary form to the Home Office, Attn: Outreach and Engagement
- 6) Make sure that at least 5 members who worked on the event personally sign in on the back of the summary form.
- 7) Please allow up to 4 weeks for processing your matching funds request.
- 8) When you receive the matching funds from Home Office, write a check from your Court / Impact Team treasury in the amount of all proceeds deposited there and present BOTH checks to the recipient.
- 9) **MAKE THIS A PHOTO OP!** Present the checks at Mass, a community event or special Court / Impact Team meeting. Take pictures to send to Home Office, and to be included in your parish bulletin and local newspaper! *Once the pictures of the event are sent to the Home Office, we own the rights.* Pictures may be used in the 1891 Financial Life magazine, website, press release, or social media coverage. No photos will be returned.
- 10) Start planning for next year!

What is not allowed.

- Funds must be raised for local organizations/chapters only — no national projects.
- Cash donations will only be considered up to \$200 when reporting earnings; *donations cannot be from the Court / Impact Team treasury.*
- No matching funds will be given for an event co-sponsored with another fraternal insurance benefit society.
- For sole sponsorship there can be no publicity in connection to another group or organization.
- The Court / Impact Team may not retain any of the funds raised. All proceeds must be donated to the beneficiary.

For more information about the 1891 Financial Life Hearts and Hands Program contact:

Outreach and Engagement: outreach@1891FinancialLife.com (800) 344-6273