

Heart-to-Heart Guidelines

- 1. The Heart-to-Heart fund is designed to support members of the KW Chico Area Market Center facing an unforeseen emergency or hardship.**
- 2. Nomination forms are located in the forms drawer. They need to be turned into the President.**
- 3. When a nomination form is received, the President will call the person who submitted the form to get more information. Next, the President will send an e-mail to the following people for voting:**
 - a. Lisa Bristow - President
 - b. Brewster Beattie – Vice President
 - c. Becky Johns
 - d. Shari Dixon
 - e. Heidi Winslow
 - f. Marc Wilson
 - g. MCA - Brenda Saeturn (non-voting member)
- 4. Once the e-mail is received, the MCA will provide information regarding the available Heart-to-Heart funds.**
- 5. The board has 7 days to respond to a grant request.**
- 6. If the grant is APPROVED:**
 - a. The President will contact the grantee to let them know they received a grant from the Heart-to-Heart fund at Keller Williams Realty Chico Area. Please ask if the grantee needs the check paid directly to them, or to the business which payment is owed.
 - b. If the payment is being sent directly to the grantee, please confirm the mailing address at which they wish to receive the grant.
 - c. Once the final vote and amount is decided the MCA will cut and distribute the check and send it with the Heart-to-Heart grantee letter.
- 7. If the grant is DENIED:**
 - a. The President needs to let the person who requested the grant know that their grant has been denied.
- 8. What are the guidelines to receive a grant?**

- a. *Associates of KW Chico Area Market Center and their spouse/domestic partner, parents, children and siblings or other members of their household, faced with financial hardship due to unexpected major emergencies, are eligible to apply for KW Heart-to-Heart grants. Grants will be considered regardless of the individual's participation in donating to the fund. Grants are designed to cover actual, not anticipated, expenses.

9. How much of the Heart-to-Heart fund can be allotted to one individual?

- a. In order to have funds available, no grant shall be greater than 30% of total funds available in the Heart-to-Heart account.

10. Please keep in mind:

- a. Grants are confidential unless the recipient wishes to share it with others or offer a testimonial at an office meeting. It's very important that the trustees keep the information private as some of the reasons for a grant are of a highly personal nature.
- b. No repayment of a grant is ever expected however if the recipient's circumstances improve we would gladly accept an additional contribution.

11. In some cases, a KW Cares donation may be appropriate. There is an application process to submit a KW Cares request. Please refer to this link for KW Cares guidelines and grant application: <http://www.kwcares.org/grants>

*Associates refer to anyone working under KWRCA.