HNBA Submission Process: Event Approvals, Calendar & Reimbursements

STEP 1: Before Your Event (Approval)

- ALL events, whether or not using HNBA funds/logo, must be submitted for approval at least 2 weeks before your event

Event Approval Process:

- Requests by Chairs ONLY – requests by others will be denied
- ONE event per email (if you include more than one event, request will be denied)
- All documents must be included in ONE email (if you send multiple emails, request will be denied)

1. Email to vpsections@hnba.com and Treasurer@hnba.com
2. Email subject line: “name of your DSC&TF” – Event Approval Request – Event Name” (i.e. Event Approval Request – June Networking Mixer)
3. Complete/attach the following:
   a. Event & Budget Approval Form (word doc – see DSC&TF Library)
      i. Fill in ALL sections (n/a if not applicable)
      ii. Identify ALL funding sources (i.e. regional budget, sponsorships, gifts in-kind)
   b. Attach proposed flyer and/or other materials that will be used to advertise

- Retain a copy of my approval email! You will need it for reimbursement.
- Keep copies of receipts/invoices/cleared checks
- DO NOT submit receipts that also contain personal purchases
- Make sure to track event metrics – you will need them in order to complete the required Success Tracker!

Event Suggestions:

- CLE Panels
- Guest Speakers on substantive issues or matters concerning our community
- Roundtable Lunches (consider recurring)
Mentoring Program
Region Gala or other major event
National programs (i.e. Su Dinero)
Welcome Reception for HNBA President
Fundraising event/reception for HNBA VIA (Vision In Action) Fund & Endowment (our 501(c)(3) charitable arm)
   Encourage use of https://smile.amazon.com/
   Networking Mixers – must include a speaker and/or some community info/action/registration table at the event etc.
   AC/CCC – Meet and Greet

Fundraising/Sponsorships

4. All checks must be made payable to the “Hispanic National Bar Association”
5. Log all checks received in the HNBA online “Checks Log” (see DSC&TF Library)
6. Once logged, mail to HNBA National Office (use tracking!)

Gifts In-Kind

7. Follow instructions on In-Kind Donation Form (DSC&TF Library) and send with letter to National Office
8. Letter must be on donor letterhead
9. Value of donation is up to donor (i.e. value of venue, food, printing)

STEP 2: HNBA Calendar (after event approval)
   • After your event is approved, you must submit the event to the HNBA online calendar

How to Submit Event to Calendar:
   10. From homepage, scroll below president’s welcome message and click on “HNBA Calendar”
   11. Click green button top right “Submit Event”
   12. Fill out form; click green button top right “Check and Submit”
   13. Review info and click green button “Submit”
   14. Click “Finish”

STEP 3: After Your Event (Metrics & Reimbursement)
   ALL EVENTS must be submitted to the Success Tracker (see DSC&TF Library) – whether or not you used HNBA funds. A copy of the tracker or a sentence confirming that the tracker has been filed out must accompany ANY request for reimbursement.
   • This information is essential – our strategic partners require this information in our applications for funding!
How to fill out Success Tracker:
Go to DSC&TF page [https://hnba.com/leadership/hnba-sections-committees/](https://hnba.com/leadership/hnba-sections-committees/)
At top of page, click blue button “REPORT”
Fill in form & click “Submit”

Reimbursement Request Process:
- Requests by Chairs ONLY – requests by others will be denied
- **ONE event per email (if you include more than one event, request will be denied)**
- **All documents must be included in ONE email (if you send multiple emails, request will be denied)**
- You will not be reimbursed until you complete the Success Tracker!

15. Email to [vpsections@hnba.com](mailto:vpsections@hnba.com) and [Treasurer@hnba.com](mailto:Treasurer@hnba.com)
16. Email subject line: “Region # – Reimbursement Request – Event Name” (i.e. Region I – Reimbursement Request – June Networking Mixer)
17. Complete/attach the following:
   a. Your original **Event & Budget Approval Form** (one you submitted before event)
   b. Copy of my email to you approving the event
   c. Completed **Reimbursement Request Form** (excel spreadsheet – see DSC&TF Library)
      a. All supporting documentation (receipts/invoices/cleared checks)
         i. DO NOT submit receipts that also contain personal purchases