



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](mailto: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/>

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

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