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 Regional President 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 VPRegionsAffiliates@hnba.com and Treasurer@hnba.com
2. Email subject line: “Region # – Event Approval Request – Event Name” (i.e. Region I – Event Approval Request – June Networking Mixer)
3. Complete/attach the following:
   a. **Event & Budget Approval Form** (word doc – see SharePoint & RP 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!**

Fundraising/Sponsorships

1. All checks must be made payable to the “Hispanic National Bar Association”
2. Log all checks received in the HNBA online “**Checks Log**” (see RP Library)
3. Once logged, mail to HNBA National Office (use tracking!)
Gifts In-Kind

1. Follow instructions on In-Kind Donation Form (see SharePoint & RP Library) and send with letter to National Office
2. Letter must be on donor letterhead
3. 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:
1. From homepage, scroll below president’s welcome message and click on “HNBA Calendar”
2. Click green button top right “Submit Event”
3. Fill out form; click green button top right “Check and Submit”
4. Review info and click green button “Submit”
5. Click “Finish”

STEP 3: After Your Event (Metrics & Reimbursement)

- ALL EVENTS must be submitted to the Success Tracker (see RP Library) – whether or not you used HNBA funds.
- This information is essential – our strategic partners require this information in our applications for funding!

How to fill out Success Tracker:
1. Go to RP webpage: https://hnba.com/regional-presidents/
2. At top of page, click blue button “REPORT”
3. Fill in form & click “Submit”

Reimbursement Request Process:

- Requests by Regional President 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!

1. Email to VPRregionsAffiliates@hnba.com and Treasurer@hnba.com
2. Email subject line: “Region # – Reimbursement Request – Event Name” (i.e. Region I – Reimbursement Request – June Networking Mixer)
3. 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 SharePoint & RP Library)
      a. All supporting documentation (receipts/invoices/cleared checks)
         i. DO NOT submit receipts that also contain personal purchases