

**Set-Up Form**

**Educational Programs**

**V.02022018**

* Please submit this form no less than **6 weeks prior to the event date**; late submissions may not receive adequate promotional emails for a successful event.
* Submission of incomplete forms will be returned for completion and may delay the opening of registration.

**Send completed form to** [**events@hbanet.org**](mailto:events@hbanet.org)

**\*Required fields are highlighted in “red.”  
Date completed:**

**Region:**

**Chapter/Affiliate location:**       (for a full list of chapters/affiliates, visit[**http://www.hbanet.org/chapters**](http://www.hbanet.org/chapters)**)**

**Other chapters involved with this event:** ; if yes select **Chapter/Affiliate location:**

**Do you wish you open registration or issue a save-the-date announcement?**

**Name of board member who has reviewed:**

**Event type**:

**Event audience** (select only one):

**Click here to view the** [HBA Leadership Competency Framework](http://www.hbanet.org/sites/hba.cms.memberfuse.com/hba/files/Events/pdf/HBA_Leadership_Competency_Framework_One_Page_Version.pdf)

**- Primary competency:**

**- Secondary competency** - Select only if a significant portion of the content falls under an additional

competency area; otherwise leave as “No secondary competency”:

**Event date:**       **Start time:**        **End time:**       **Time zone:**

Assumes event is in local time

**Event title** (No more than **100 characters** including spaces.)   
     

**Event short description** (Used to promote the event on the Events Calendar page; (**max of 200 characters including spaces**.)

**Event description** (max of **1000 characters**, spaces included. Used to promote programs in eblasts; full description.)

**Learning objectives**

* Provide at least 1, but no more than 3 objectives.
* Objectives should be written to follow this statement: *“After participating in this program, you will be able to”…*
* **Tips:**

- Objectives should be specific and measurable.

- Begin each objective with an action verb. [**Click here for a list of action verbs and other tips.**](https://meded.ucsd.edu/index.cfm/ugme/oede/educational_development/curriculum_development/how_to_write_goals_and_objectives/)

Do **NOT** use know, learn, understand or believe.

- Objectives should include only one learning outcome (i.e., don’t write “compound” objectives).

- Objectives should be able to be accomplished during the program (i.e., make sure they are realistic

for the length and nature of your program.)

**“After participating in this program, you will be able to...”**

1.       
2.

3.

**Agenda**

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**Event location**

Name of venue:

Address:        
City/state/zip:

Phone:

**Special instructions** (e.g., parking information):      

**Sponsors (To add logo to event materials, please send jpg via email with set-up form.)**

Company name:

URL:

Company name:

URL:

Company name:

URL:

Company name:

URL:

**Speakers (Please include a jpg headshot/photo via email with set-up form)**

Name:

Title:

Company:   
Link to bio (or provide a PDF of bio):

*Email (not published):*

Name:

Title:

Company:   
Link to bio (or provide a PDF of bio):

*Email (not published):*

Name:

Title:

Company:   
Link to bio (or provide a PDF of bio):

*Email (not published):*

Name:

Title:

Company:   
Link to bio (or provide a PDF of bio):

*Email (not published):*

Name:

Title:

Company:   
Link to bio (or provide a PDF of bio):

*Email (not published):*

**Registration information**

**Event is open to:**

**Online registration deadline:**         
**Onsite (walk-in) registration:**

**Member rate:** **(mandatory $30 minimum; you may choose to go higher)**  
$      until       (date)  
$      after       (date)

**Nonmember rate: (mandatory $45 minimum; mandatory 50% pricing difference from member pricing; you may choose to go higher)**

$      until       (date)  
$      after       (date)

**Other rate:** **(this rate cannot be less than the member rate)**

Name of rate:         
$      until       (date)  
$      after       (date)  
  
**Capacity**

Is capacity limited?

Space is limited to       registrants.

*Actual capacity (max allowed in system; not published):*

**Cancellations/refunds**

Is this event refundable?

If yes, requests must be submitted in writing to [events@hbanet.org](mailto:events@hbanet.org) by      ; no refunds are available after this date.

**Event questions/support**

**-** **Chapter** **contact for event:** Name:       Email:       Phone:

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**Discount codes needed?**  **(**[**click here to review the policy on discount codes**](https://www.hbanet.org/sites/default/files/Documents/Events/Forms/2018%20Programming%20Department%20Policies.pdf)**)**

If yes; Type of discount: ;

If yes; Type of discount: ;

If yes; Type of discount: ;

**NEW: Post-Event Survey Support** - **Post-event surveys should no longer be done via paper.** HBA’s education team will create a survey for **this** event for you AND automatically provide the link to Stephanie Marchak to send out with a thank you eblast immediately following the event.

If another volunteer (e.g., Market Research DAL) creates event surveys for your chapter, please let them know that HBA Central will now do this for any event submitted **using this new form**.

**Special instructions to HBA event staff**:

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**Resources - Click on links to download these resources:**

* [HBA Style Guide](https://www.hbanet.org/sites/default/files/Documents/Events/Forms/2018%20HBA%20Style%20Guide.pdf)
* [HBA Speaker Agreement](https://www.hbanet.org/sites/default/files/Documents/Events/Forms/2018%20HBA%20Speaker%20Agreement.pdf)
* [How to Run Chapter Event Badges](https://www.hbanet.org/sites/default/files/Documents/Events/Forms/How%20to%20Create%20Event%20Badges.pdf)
* [How to Access Registration Reports](https://www.hbanet.org/sites/default/files/Documents/Events/Forms/How%20to%20Run%20Event%20Attendance%20Reports.pdf)
* [HBA Newsletter and Email Schedule](https://www.hbanet.org/sites/default/files/Documents/Events/Forms/2018%20Newsletter%20Schedule%281%29.pdf)
* [HBA Programming Policies](https://www.hbanet.org/sites/default/files/Documents/Events/Forms/2018%20Programming%20Department%20Policies.pdf)