

# Welcome to 2025 Leadership Convention

This session will begin soon



# New to Givebacks? Start Here!

Andrea Hinton, Givebacks Specialist



# How Givebacks Can Help Your PTA Run Better

*Givebacks is your secret  
weapon to conquer PTA  
tasks and thrive!*

The logo for Givebacks, featuring the word "givebacks" in a blue, lowercase, sans-serif font. A small orange starburst icon is positioned above the letter "i". The logo is enclosed in a thin black rectangular border.

- Manage officers and admin access
- Upload compliance documents
- Sell memberships and pay dues
- Sell your spirit wear and more
- Send messages
- What is Shop to Give???
- Fundraisers!!!



# Officer Onboarding - Easy as Pie!

Compliance ▾

- Submit Forms
- Update Officers
- Documents

**Compliance**

**Compliance Submissions**  
Enter your compliance submissions like Form 990s and Financial reviews. [View](#)

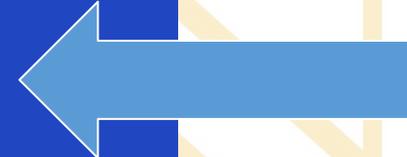
**Officers & Committee Chairs** [Officer Information Incorrect?](#) [View](#)

2023 - 2024 ✓ [Add Officer](#) <sup>1</sup>

Name	Office	Address	Email	Phone
Sally Smith	<a href="#">President</a>		myemail@email.com	8015551234

# Access Control - Keeping Things Secure

- My Organization
- Manage Access
- Unit Data
- Notifications
- Promotion Center
- Info & Settings



New Admin

## Manage Admin Roles \* New Admin Role Options

### Admins

Filter

Name	Email	Access
Ward, Gena	gena.ward@givebacks.com	Admin
Smith, Sally	myemail@email.com	Admin
MemberHub, UtahPTA	memberhub@utahpta.org	Custom   Cause View   Orders Edit   Orders View   Store Products Edit   Store Products View
Taylor, John	contactme@email.com	Admin
PTA, school	ptaemail@email.com	Admin
MemberHub, UtahPTA	memberhub@utahpta.org	Admin

# Compliance Made Easy - No More Paperwork Piles!

- Home
- Directory
- Calendar
- Shop
- Communications
- Store
- Fundraisers
- Shop To Give
- Compliance
  - Submit Forms
  - Update Officers
- Documents

## Compliance

### Compliance Submissions

Enter your compliance submissions like Form 990s and Financial reviews.

[View](#)

School Year 2024 - 2025

#### EOY - 990 IRS Confirmation Page (Due August 1st)

Submit

Due: 02/01/2024

#### EOY - AFR Annual Financial Reconciliation (Due August 1st)

Submit

Due: 02/01/2024



# Sneak Peek - What the Forms Look Like

## Report of Trainings Attended (Due October 1st) ×

Local Bylaws Article IV, Section 1 ... A Local PTA/PTSA in good standing is one which...

f. Has at least two (2) officers attend one PTA leadership training session annually;

### TRAINING OPPORTUNITIES INCLUDE:

Utah PTA Leadership Convention / National PTA Convention / Region training

[utahpta.org/university/archive](http://utahpta.org/university/archive) | [pta.org/home/run-your-pta/elearning](http://pta.org/home/run-your-pta/elearning)

### Link for Report of Training form:

<https://www.utahpta.org/files/docs/Report%20of%20Training%20Attend>



Document \*

Add Document

## EOY - 990 IRS Confirmation Page (Due August 1st) ×

Required 990 IRS Confirmation Page showing 'Accepted' status at the end of the fiscal year, due to be submitted by **August 1st. (saved as pdf)**

<https://www.utahpta.org/irs-filings>

<https://sa.www4.irs.gov/epostcard/>

If you need to redo a submission for a current year, you must first archive the existing submission for the current year before entering a new one.

Gross Receipts - Tally of current and 2 prior years (3) of income/funds received (minus S/N dues) divided by 3. If under \$50,000 file 990N if over \$50,000 file 990EZ.

### Accepted page will show:

### MANAGE FORM 990-N SUBMISSIONS

Your Form 990-N(e-Postcard) has been submitted to the IRS

Confirmation

Organization Name:

EIN:



# Membership Mania - Adding Members the Right Way

## Membership Items

Name	Category	Store	POS	State Member Type
Grandparent	Memberships	✗	✗	✓
Business	Memberships	✗	✗	✓
Student	Memberships	✓	✓	✓
Other	Memberships	✗	✗	✓
Community	Memberships	✗	✗	✓
Parent/Guardian	Memberships	✓	✓	✓
Faculty/Staff	Memberships	✓	✓	✓

- Memberships
- Members
- Membership Products**
- Remit State Dues



# Customize Your Memberships (Think Options!)

Details Parent/Guardian

[Change](#)

## Additional Fields

[Change](#)

The following fields are automatically included any time someone is purchasing a membership online through your site or an administrator is entering a membership manually

First Name Last Name Email Mobile Member Type

[Add Custom Option](#)

[Add Contact Property](#)

A valid email address OR mobile phone number (can be any 10 digits) is required for each non-student member.

Name	Type	Contacts	
+ first_name	textfield	✓	...
+ last_name	textfield	✓	...
+ email	textfield	✓	...
+ mobile	textfield	✓	...
+ member_type	dropdown	✓	...

3

[Next](#)

[Change](#)



Store Visibility Live

# Dues Made Easy - Ditch the Checks!

**givebacks**  
MemberHub is now Givebacks

Current Organization  
**Carol's Local Unit**

## Dues Payments

[Members](#) [Membership Setup](#)

You owe the Z State PTA \$20.00 for 5 members for school year 2023 - 2024 [How do I pay?](#)

[Send manual payment](#)

[Send ACH Payment](#)

2023 - 2024 | Payment Type | Status

Date Created	Payment Type	Reference	Membership Count	Amount	Fees	Status	Date Paid	Received By State	Void Payment
12/06/2023 at 4:09 pm	Check	123	1	\$4.00		Received	12/06/2023		X

Navigation Sidebar:

- Carol's Local Unit
  - Dashboard
  - Directory
  - Calendar
- YOUR TOOLS
  - Communications
  - Contacts
  - Shop To Give **New!**
  - Fundraisers
  - Store Management
  - Website Builder
  - Memberships**
    - Manage Members
    - Manage Membership Items
    - Remit State Dues**
  - Compliance
  - Financial Management



# Spirit Wear & More - Sell Like a Pro!

Home

Directory

Calendar

Shop

## Tools

Contacts

Memberships

Communications

Store

Products

Bundles

Categories

Point of Sale

Product Fundraisers

Ordered Items

New Membership

New Product

## Products

Name	Categories	Store	POS	Inventory
tshirt 2022-2023	Donations	X	X	X
Open Donation	Donations	X	X	X
tshirt	Donations	X	X	X

Display 25 per page



# Product Details - Make Them Shine!

**givebacks**  
MemberHub is now Givebacks

Current Organization **Carol's Local Unit**

< Products  
**New Product** Save

**Details** Add

Name

Description

Long Description

Normal **B I U G "**



# Extra Tips & Tricks

The screenshot displays the Givebacks MemberHub interface for 'Carol's Local Unit'. The top right corner shows the current organization name and a user profile icon. The main content area is titled 'New Product' and contains a form with several sections: 'Details' (Add), 'Additional Fields' (Change), 'Inventory Tracking' (Off, Change), 'Store Visibility' (Live, Change), and 'Photos' (Add). A yellow arrow points to a blue 'Save' button in the top right corner of the form area. The left sidebar contains navigation options for the local unit and various tools.

givebacks  
MemberHub is now Givebacks

Carol's Local Unit

- Dashboard
- Directory
- Calendar

YOUR TOOLS

- Communications
- Contacts
- Shop To Give New!
- Fundraisers
- Store Management

Current Organization  
Carol's Local Unit

< Products

## New Product

Save

Details	Add
Additional Fields	Change
Inventory Tracking Off	Change
Store Visibility Live	Change
Photos	Add



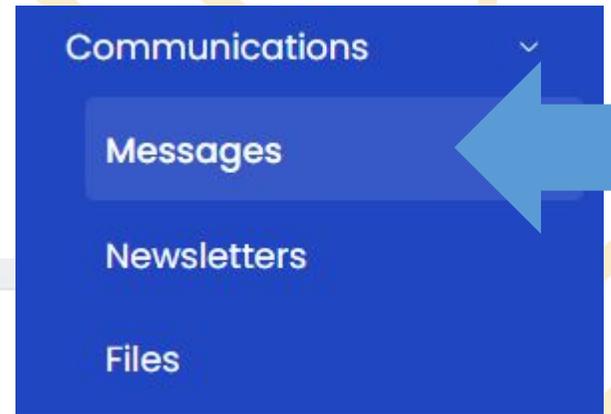
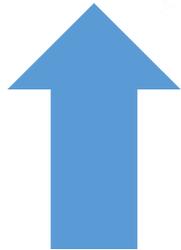
# Spread the Word with Givebacks Messaging

## Message Details

### Recipients

Start typing the name of a contact, hub, role, saved filter, or use the selectors below

You can also send to everyone or select from contacts, hubs, roles or saved filters



### Add Role Filter

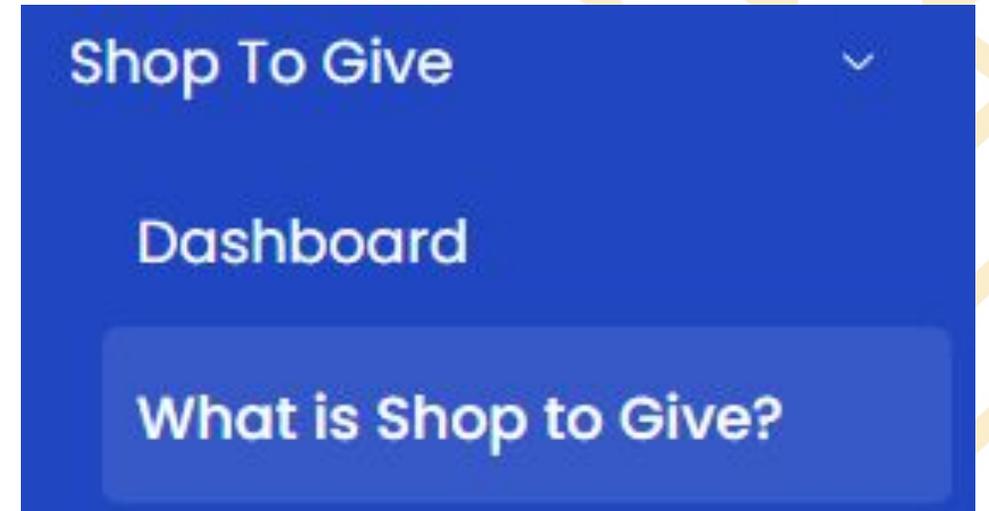


Role filters allow you to select only users that have this role within your organization.



# Shop to Give - Turn Everyday Shopping into Superpower Fuel!

The good news is, if your organization has a Givebacks store, you are already set up for Shop to Give and you will automatically get your payouts weekly in your existing Givebacks stripe account!



*Log in to your Givebacks site and go to Shop to Give on your toolbar.*



# Fundraising Made Easy - Unleash Your Inner Fundraising Ninja!

## 3 Levels of Support

- Do It Yourself Options
- Step by Step Guide
- Fundraising Experts

## 6 Types of Fundraisers

- Crowdfunding
- A-Thons
- Multi-Type
- Auctions
- Sweepstakes
- Ticketed Events

### Crowdfunding

#### Achieve big goals with crowdfunding

Crowdfunding allows you to raise money virtually, without the need to host an event, track paper forms, go door-to-door, or chase down people for payments. And by harnessing the power of social media and the enthusiasm of your supporters, you can expand your supporter base exponentially to raise more money and rally new volunteers. Create team pages or add incentives to up the excitement.

[Start Crowdfunding](#)

[View Step-by-Step Guides](#)



# Power Up with Givebacks Resources!

- Getting started with your Online Store
- How do I set up Stripe to take payments with Givebacks?
- How can I set up memberships and create custom/family memberships in the store?
- Can I import members?
- How do I download a report of Stripe payouts for reconciliation?
- How do I change settings for the processing fees in my store?
- How do the Credit Card Processing fees work for the store?
- How do I view my orders?
- Managing Your Cause with Shop to Give



# Andrea Hinton

*Givebacks Contact*

[givebacks@utahpta.org](mailto:givebacks@utahpta.org)  
[support@givebacks.com](mailto:support@givebacks.com)

[support.givebacks.com](http://support.givebacks.com)  
[youtube.com/@Givebacks](https://youtube.com/@Givebacks)

What  
questions  
do you have?

# Connect with us on social media



FACEBOOK

- Utah PTA
- Utah PTA Advocacy
- Utah PTA Super Secondary
- Utah PTA Excellent Elementary
- Utah PTA Treasurers
- Utah PTA Reflections
- Utah School Community Councils
- Utah PTA Teachers



# Connect with us on social media

INSTAGRAM - @UtahPTA



X - @UtahPTAOneVoice



PINTEREST - Utah PTA



YOUTUBE - Utah PTA One Voice



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