

WELCOME TO 2024 LEADERSHIP CONVENTION

Session will begin soon





DEVELOP
ADVOCATE
ENGAGE

UTAH

Develop programs, resources, and leadership skills that enhance the lives of all children, youth, and their families.

Advocate by speaking on behalf of all children and youth in schools, in the community, before governmental bodies, and before other organizations that make decisions affecting children.

Engage the public in united and equitable efforts to secure the physical, mental, emotional, spiritual, and social well-being of all children and youth.

TREASURERS: COMPLIANCE AND GIVEBACKS

Karen Beebe
Utah PTA Treasurer



Accountability & Transparency (Review)

- Maintain Accountability and Transparency at all times.
- Each PTA unit is accountable to its members, sponsors, community, and government regulatory agencies.
- Each PTA unit and its leaders are accountable for maintaining the good reputation that PTA has earned over its long history.
- Transparency is crucial for all nonprofit organizations, and PTA is no exception.



What is Compliance?

- Compliance is a term used to describe the act of conforming, acquiescing, or yielding.
- It can also refer to the act of obeying a law or rule, especially one that controls a particular industry or type of work.
- Compliance standards are often legally binding and enforced by government agencies, and they restrict the way organizations conduct business.



What is Givebacks?

- Givebacks (previously known as MemberHub) is the platform Utah PTA uses for compliance document submission.
- The submission of documents via Givebacks is **REQUIRED**.



Nonprofit Compliance Requirements

- Maintain a registered agent
- Maintain charitable solicitation or fundraising registration
- File annual reports
- File an annual form 990 with the IRS
- Maintain state-level tax exemption
- Conduct proper board meetings
- Meet record-keeping requirements



What is Good Standing?

National PTA and Utah PTA have set guidelines to assist local units with nonprofit compliance.

Good standing is a term used by PTA to certify that a unit is in compliance with the requirements of nonprofit law through the policies outlined in the local unit's and Utah PTA's bylaws.



Why is Good Standing Important?

- Good standing and compliance with nonprofit law are crucial for the long-standing health of Utah PTA.
- Adherence to Good Standing policies protects:
 - the entire organization,
 - each individual unit,
 - and the leaders within the organization.



Good Standing Requirements

- Adhere to the purposes and policies of PTA.
- Secure and maintain an EIN with the IRS.
- Keep current bylaws (renew every three years).
- Maintain at least 10 members (including president and treasurer) each year.
- Remit national and state portions of dues as required.



Maintaining Good Standing Status

- Keep a current list of officers with Utah PTA via Givebacks.
- Submit End of Year Compliance Documents (due Aug 1st):
 - Year-end Financial Statement via Givebacks.
 - Annual Financial Reconciliation via Givebacks.
 - IRS Form 990N or 990EZ e-filed at irs.org.
 - Sales Tax Refund Request via utahpta.org.



Good Standing Requirements

- Submit Beginning of Year Compliance Documents via Givebacks (due Oct 1st):
 - Budget approved by General Membership
 - Minutes of Budget Approval
 - Proof of Insurance
 - Signature Pages: Basic Fiscal Management Procedures
 - Signature Pages: Ethics/Conflict of Interest Agreement
 - Report of Trainings Attended



Benefits of Good Standing

A unit in Good Standing:

- Has all of the rights and benefits of a nonprofit organization.
- Participates in PTA programs; such as, Reflections, Battle of the Bands, etc.
- Qualifies for state and membership awards.
- May apply for National PTA grants and awards.
- May receive directed donations from corporate sponsors and employee match programs.
- Receives refund of sales taxes paid.



Unit not in Good Standing?

- Use of the 501c3 status awarded by the umbrella organization will be removed.
- Continued non-compliance could result in permanent removal of EIN by the IRS.
- Unit may not fundraise under the Utah PTA charitable solicitation permit with the Utah Department of Commerce.
- PTA programs are not available to the unit or the students (i.e. Reflections, Battle of the Bands).
- Sales Tax refunds will not be issued to units not in Good Standing.
- Other benefits will be withheld: Google Workspace, Canva, Tech Soup account, receipt of Directed Donations, etc.



There is Good News!

Compliance and Good Standing are fluid!

Council, Region, and State leaders are available to help local units restore their compliance/Good Standing status.



Elephant in the Room...

PTO VS PTA



Givebacks Training - Gaining Access

- If you do not have access to Givebacks, a current officer needs to add your role to your Givebacks account.
- Once admin access is given, under the main toolbar on the left, select:
 - COMPLIANCE > ENTER SUBMISSIONS
 - This will take you to the screen to upload your compliance documents.



Givebacks Training - Timing of Upload

- All documents are uploaded into the School Year that is the date in which the uploading occurs.
 - End of Year Documents for the fiscal year ended 6/30/24 are uploaded after July 1st and before August 1st 2024; therefore, they should be uploaded under the 2024-25 school year.
 - Beginning of Year Documents for the fiscal year that ends 6/30/25 are uploaded before October 1st 2024; therefore, they should be uploaded under the 2024-25 school year.



Givebacks Training - Document Status

- Once documents are uploaded they will show as pending until they are reviewed and either accepted or rejected by the council, region, or state level.
- If a document is rejected, you should receive an email with the reason for rejection. This will alert you that a correction is needed before it will be approved.



Givebacks Training - Document Status

- The column on the right with statuses is actually a menu for processes.
- When there is a “Submit” box in blue:
 - The verbiage underneath the box states the stage of the document.
 - If it states “Due: 8/1/24” or “Due: 10/1/24” this indicates that no documents have been uploaded.
 - If a document has been uploaded, it will read “Awaiting Review.” Council, Region, or State Leadership should review and either accept or reject.



Givebacks Training - Document Approved

- When there is a green check with the verbiage “Approved: xx/xx/2024” that means it has been accepted. Congratulations!
- A copy of the uploaded document can be downloaded by clicking on the green checkmark. It will pull up a box, from there click download. This will automatically save a copy of the document in the Downloads folder on the computer.



Givebacks Training - Document Rejected

- When there is a red X with the verbiage “Rejected: xx/xx/2024” that means there is an issue that needs correction..
- Click on “Reason” in black to pull the note from the review.
- Correct the issue and prepare to re-upload the corrected document.



Givebacks Training - Replacing a Rejection

- Click on the red X with the verbiage “Rejected: xx/xx/2024.”
- Scroll down and click on the red box “Archive.”
- Click on the red box “Confirm.” This will remove the document from the Enter Submission screen.
- Archiving a document will reset the blue box “Submit” with the due date verbiage underneath.



Givebacks Training - Ongoing Submission Process

- The Compliance Document submission process should continue until all documents have been approved/accepted.
- The Treasurer should watch the Enter Submissions page to ensure that all documents have been reviewed and approved.
- Reach out to Council, Region, or State leadership if there doesn't seem to be movement from their end.



Questions?
karen@utahpta.org
801.419.3271

Karen Beebe
Utah PTA Treasurer



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



THANK YOU TO OUR SPONSORS!

