

***givebacks**

Lexington 05: SSO Compliance Training



School District Five of Lexington &
Richland Counties

"We Love and Grow Our Students!"



Please scan QR to sign in for training

Meeting Goals

- 1 What is Givebacks?
- 2 How does Givebacks Help You?
- 3 How to Submit Fundraiser Approvals & Other Forms
- 4 Givebacks Additional Features
- 5 How to Contact Support & Book Your 1:1 Training Meeting



Meet the GB Team



Sarah Huettl
Account Executive

Sarah brings over 20 years of K-12 school financial software experience.

She serves as the President for her children's PTA.

Sarah enjoys playing tennis and spending time with her 10-year old twins.



Shonna Johnson
Implementation and Relationship Manager

Shonna brings over 12 years of K-12 school financial software experience and worked at a NC school district for 8 years.

She has served on her children's athletic booster and PTO.

Shonna enjoys spending time with her family and two family pets.



Nicole Merlo
District/School CSM

Nicole brings over 8 years experience leading clients to success, most have been in the k-12 software space.

Nicole enjoys spending time at the barn and spending time with her husband and two sweet girls..

When in doubt, give me a shout!



Caleb Simpson
SSO Customer Success Manager

I'm a 2018 graduate of Emory & Henry University, where I double-majored in Mass Communications and Economics. Originally from Richmond, VA, I'm a lifelong runner, basketball fan, and proud former teacher.

Some of my closest bonds are still with my college cross country teammates, and time with friends and family continues to be my biggest motivators.

After working in education and mentoring the next generation, I'm passionate about freeing up time for volunteers so they too can focus on what matters most.



Givebacks is the “easy button” for your forms submissions and creating fundraisers!

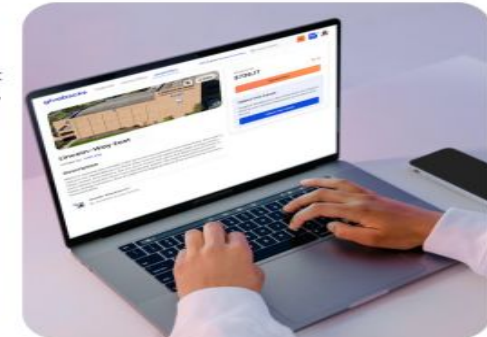
givebacks **Overview**

- Givebacks has been implemented to help streamline communication between the School Support Organizations/PTOs and Schools/District through form submissions and approval flows.
- SSOs/PTOs also have the ability to use Givebacks to create an online store and fundraisers for online/in person payments.
- Schools are part of the form approval process for forms submitted by the SSOs/PTOs.

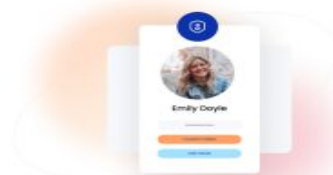
The go-to platform for K-12

Givebacks is the all-in-one solution that thousands of booster clubs, PTOs, foundations, and other school support organizations rely on every year to manage memberships, raise funds, and everything in between.

- * Membership management
- * Storefront
- * Mobile point-of-sale
- * Fundraising
- * Supporter communications
- * Document storage



Everything you need, all in one place



Easily manage members with our comprehensive system for keeping track of member information.



Make it easy for supporters to pay you with a card anywhere by going cashless with our mobile swiper.



Acquire, reach, and engage supporters with effective communication solutions.

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Compliance

July 2024

Process for Compliance Requests

- **SSO Fundraiser Request**
 - **Submitter: SSO Officer**
 - **Approver 1: Principal**
- **Parent Organization Annual Registration-Due August 1st**
 - **Submitter: SSO Officer**
 - **Approver 1: District**



How to Enter Submissions

Submit Forms

Year > 2025 - 2026 X

2025 - 2026 Required Forms Year 2025 - 2026

Name	Due Date	Status	
Booster Club Annual Registration	08/01/25	Past Due	Submit Form

Display 25 per page

Available Forms

Name	Drafts	
SSO Fundraising Request	--	Start New Form

Display 25 per page

Submission History Filter

Year	Name	Status	Status Details	Submitted By	Due Date	Submitted On
------	------	--------	----------------	--------------	----------	--------------

How to Enter Submissions/Check Status

×
SSO Fundraising Request

General Details

Ballentine Elementary School Parent and Teachers Organization

Shonna Johnson

shonna.johnson@givebacks.com

Fields

Name of School/Organization: *

Company providing product: *

Item(s) sold DO NOT LIST AS MISCELLANEOUS: *

Cost of item(s) being sold: *

Selling Price of item(s): *

Save
Submit

×
Fundraiser Approval Form - Restricted

View Workshops & Meetings

Need some help from a human?

Chloe High School

- Dashboard
- Directory
- Calendar

YOUR TOOLS

- Communications
- Contacts
- Fundraisers
- Store Management
- Website Builder
- Compliance Manager
 - View Unit metrics
 - Manage Unit Data
 - View Compliance Reports
 - Enter Submissions
 - Update Officers
 - Manage Compliance Forms
- Settings

← Fundraiser Approval Form - Restricted Submissi

Org Name	Parent Org	Submitter Name	Submitter
Chloe High School	Demo District	nicole teacher compliance	nicole.m

Browse Files

Approval History

Submission Date: 06/26/2023

Submitter: nicole teacher compliance

1. Submitter: nicole.merlo+teachercompliance@memberhub.com
Email:

Approved
06/26/2023

Signer Name: Nicole Bookkeeper Compliance

2. Signer: nicole.merlo+bookkeepercompliance@memberhub.com
Email:

Signer Type: Bookkeeper

Note: Approval Note

Pending

3. Signer Type: Principal Testing 1

10
?

givebacks

Compliance: Notification Types

Notification Types

Submitter Notifications:

- Submitter automatically receives an email notification once the form has been declined or after final approval.

Approver Notifications:

- Approver automatically receives an email notification when action for approval review is required (aka - his/her turn) . A link to the form approval is included in the email notification.

Compliance Form Notifications:

- Optional notification type to add a user's email to receive email notification when a specified form type is submitted, approved, or rejected.

How to Compliance Notifications

The screenshot displays the Givebacks web application interface. On the left is a blue sidebar navigation menu with the following items: Home, Directory, Calendar, Shop, Tools, Contacts, Communications, Store, Fundraisers, Shop To Give, Compliance, Financial Management, Website, My Organization, Manage Access, Manage Sites, Notifications, Promotion Center, and Info & Settings. The 'My Organization' and 'Notifications' items are highlighted with orange boxes. The main content area is titled 'Notifications' and shows a notification recipient 'Confirmed' and a 'Display 25 per page' dropdown. A 'New Notification' modal is open on the right, containing the following fields: 'Notification Recipient' (nicole.merlo@givebacks.org), 'Notification Type' (Compliance Forms), and 'Subscribe to Submissions' (with an 'Add New' button and a checkbox for 'Subscribe to all submissions'). Below the modal is a dropdown menu showing 'Annual Form - Nicole Testing (District 2)'. In the bottom right corner, there is a blue button with the text 'Crea g *b' and a circular notification badge with the number '4' and a question mark.

Update Officers

Workshops

givebacks
MemberHub is now Givebacks

Allen Elementary School PTA-SSO

- Dashboard
- Directory
- Calendar

YOUR TOOLS

- Communications
- Contacts
- Fundraisers
- Store Management
- Website Builder
- Memberships
- Compliance**
 - Update Officers**
 - View Unit Data
 - Enter Submissions
 - View Documents
- Settings
- Shop to Give New!

QUICK LINKS

- View Store
- Givebacks Store

Current Organization
Allen Elementary School PTA-SS

Allen Elementary School PTA-SSO

Since 07/01/2023

Please visit your Stripe Dashboard to ensure your Stripe account is in good standing.


1
Contacts

0
Members

\$0.00
Gross Sales

Recent Messages View All Messages


Start a conversation!



Create a New Message

Recent Orders View All Orders

Easily sell anything online.



Set Up Your Store

Important step!

Checklist

- Update your subdomain and mailing address
- Set up your Stripe account for online payments
- Edit your membership listing
- Add products to your store
- Your Fundraiser site is ready for you to begin!
- Subscribe to Product Fundraisers
- Add or import contacts
- Send a message

Upcoming Events View Calendar

Manage meetings, events, and volunteers.



Create an Event

File Uploads View All Files

Don't forget to order your mobile swiper for in-person payments.



Update Officers

Compliance

Compliance Submissions


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

[View](#)

Officers & Committee Chairs

[Officer Information Incorrect?](#)

[View](#)

2025 - 2026 

Add Officer

Name	Office	Address	Email	Phone
Amber Wasdin	President		awasdin@icloud.com	4239027559

Update Officers

Title *

- President
- Vice President
- Secretary
- Treasurer
- Fundraiser Chair

Name, or email address and automatic options will appear.

Email Address *

First Name

Last Name

Phone Number

Add as Organization Admin



Notify contacts by email



Close

Save



Additional Modules:

Fundraising
Communications
Online Store
Point-of-Sale

Fundraisers

- Home
- Directory
- Calendar
- Shop
- Tools**
- Contacts
- Memberships
- Communications
- Store
- Fundraisers
 - All Campaigns
 - Direct Donations
 - Explore Fundraisers
- Shop To Give
- Compliance
- Financial Management
- Website
- My Organization

New Campaign

Explore Fundraisers

Crowdfunding
A-Thons
Ticketed Events
Auctions
Raffles & Sweepstakes

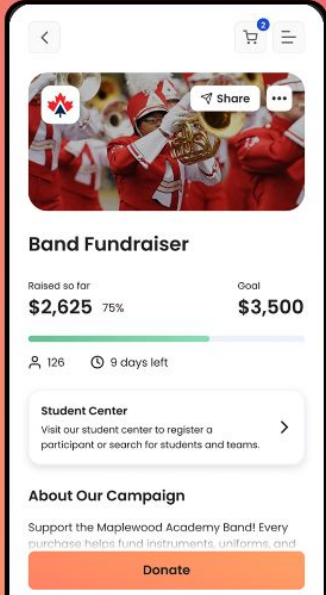
Rally support with crowdfunding

Mobilize your supporters around an easy to launch crowdfunding campaign.

- Tailored donation experience
- Add prizes that incentivize participants
- Turn one-time donations into ongoing passive giving

Resource Center
Preview Example

Get Started



Still have questions?
Let's chat! Book a meeting and we'll walk you through your options.

Schedule a meeting

Fundraisers

Slam Dunk Basketball Fundraiser Page Preview

[View Editor](#)

[Reload Page](#)



[← Back](#)



Raised So Far
\$0.00

Goal
\$2,000.00

🕒 380 + days left

[Register](#)

Slam Dunk Basketball Fundraiser

Student Center

Visit our Student Center to register or search for students. [>](#)

About Our Campaign

Bailey High School's Basketball team is fundraising to help cover some of the operational and team costs. We are looking to purchase 10 new basketballs, 2 new nests, and would love to provide snacks and refreshments before each game. Your support and donations can help make this possible!

Communication:




Many organizations use over 7 disconnected software tools for communication and fundraising causing parent confusion and low volunteerism.



Communications, Messaging, & Signups:

- Home
- Directory
- Calendar
- Shop
- Tools**
- Contacts
- Memberships
- Communications**
- Messages
- Newsletters
- Files
- Store
- Fundraisers
- All Campaigns
- Crowdfunding
- A-Thons
- Ticketed Events
- Auctions
- Raffles and Sweepstakes
- Multi-type Fundraisers

Workshops
Current Organization
Allen Elementary School PTA-SSO


[← Newsletters](#)

New Campaign

Send Now

[Edit Name](#)
[Save](#)
[Preview](#)

Message Type Normal
[Change](#)

Recipients
[Change](#)

Sending to 1 recipient
If you'd like to change your recipient list, click [Change](#)

Recipients

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

Sending to 1 recipient


You can also [send to everyone](#) or select from [contacts](#), [hubs](#), [roles](#) or [saved filters](#)

Next




Subject
[Add](#)

Template
[Add](#)

Scheduled Send



Online Store:

-  Bearden High
- All Products
- Band
- NAHS
- Football-Dawg Pound Concessions
- Bearden Dance Organization
- Football Dawg Pound
- Athletic Passes
- Girls Soccer
- Staff Matters
- Volleyball
- Softball
- Golf
- College Fair
- Dawgpound Spirit Shop
- PSAT
- Contact Store Admin
- View Website 
- Givebacks Store FAQs 



Highlights



Football Player Fees 2025



BHS Football Home Games - 2025 Season



BHS Volleyball Home Games - 2025 Season



BHS Girls Soccer Home Games - 2025 Season

All Products



BHS Dance Coach's Monthly Fee

Each month due by the 5th of that month.

\$155.00



Marching Band Fee

1st payment due May 19th. 2nd payment due Aug 7th

\$650.00



BHS College Fair

\$75.00



BHS Student Athletic Pass

\$65.00

Point-of-Sale:

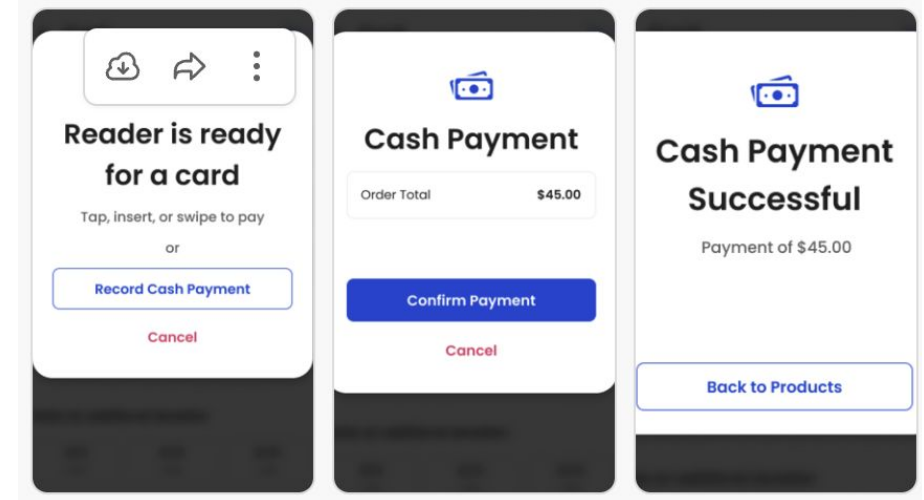
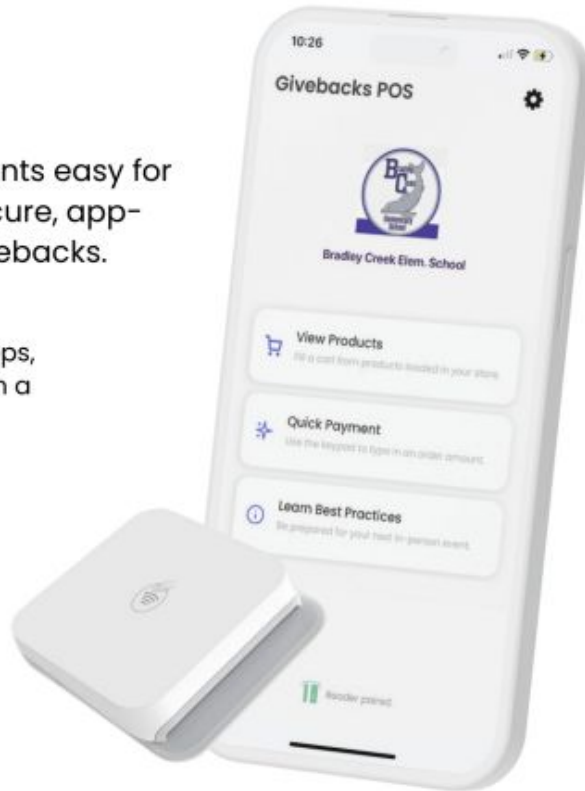
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Go cashless with *Mobile POS*

Reduce fraud risk and make cashless payments easy for schools and support organizations with a secure, app-based mobile point-of-sale system from Givebacks.

Remove the need for cash at school stores, coffee shops, concession stands, and school-based enterprises with a mobile swiper that enables:

- * Quick card payment processing
- * Simple, fast set-up with no WiFi required
- * Suggested and open-field donation amounts
- * Easy promotion of items on social media
- * Secure processing with Stripe



Everything you need, all in one place

Order a Stripe Reader:

givebacks
MemberHub is now Givebacks

Jackson County Public Schools

- Dashboard
- Directory
- Calendar

YOUR TOOLS

- Communications
- Contacts
- Shop To Give New!
- Fundraisers
- Store Management**
- Manage Products
- Ordered Items
- Manage Categories
- Mobile POS**
- Manage Fundraiser Links in Store
- Edit Store Settings
- Notifications
- Subscribe to Product Fundraisers
- Select Product Fundraisers
- Manage Existing Product Fundraisers
- Website Builder

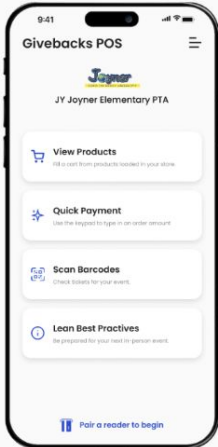

Current Organization
Jackson County Public Schools

Mobile POS * Non-Refundable - Read more HERE

Take payments on the go with Givebacks POS

Our app-based mobile swiper lets you collect payments for your cause anywhere, with no WiFi required. Simply download the free GB POS app from the Apple store, connect to your Stripe credit card reader, process transactions, and the money is deposited directly into your Givebacks Stripe account. Easily process payments quickly by entering order details, choosing receipt preferences, and letting customers tap, swipe, or insert their card. It takes just seconds!

[Order a Stripe reader](#)

Get set up fast


To pair your card reader, go to your app settings and tap "Connect Reader." Make sure the reader is on and the blue light is blinking.

Search your storefront

Keywords and filters make it simple to browse and search for items in your store so you can quickly ring them up for customers.

Accept extra donations

Use the additional donation section to add pre-selected or custom amounts to any purchase.



<https://jacksoncountync.memberhub.com/mobile-pos>

Create your Stripe Account:

The screenshot shows a dashboard interface with a blue sidebar on the left and a main content area on the right. The sidebar contains several menu items: 'Dashboard', 'Directory', 'Calendar', 'YOUR TOOLS' (with sub-items: 'Communications', 'Contacts', 'Shop To Give', 'Fundraisers', 'Store Management', 'Website Builder', 'Compliance Manager', 'Financial Management', 'Settings'), and 'QUICK LINKS' (with sub-items: 'View Store', 'Givebacks Store', 'FAQs'). The 'Financial Management' item is highlighted with a red box. The main content area is titled 'Stripe Settings' and contains a section for 'Stripe Accounts' with a message: 'Please visit your Stripe Dashboard to ensure your Stripe account is in good standing.' A blue button labeled 'Setup your Stripe Account now' is highlighted with a red box. A 'Close' link is visible in the top right corner of the Stripe Accounts section.

givebacks

Customer Support/Resources

Customer Support Is Important!

The screenshot shows the Givebacks dashboard interface. On the left is a blue sidebar with navigation options: Home, Directory, Calendar, Shop, Tools, Contacts, Communications, Store, Fundraisers, Shop To Give, Compliance, Financial Management, Website, and My Organization. The main content area features a yellow warning banner at the top: "Please visit your Stripe Dashboard to ensure your Stripe account is in good standing." Below this, there are three main sections: "Recent Store Orders" with a "\$0.00" total and a "Set Up Your Store" button; "Recent Messages" with a "New Message" button; and "Upcoming Events" with a "Create an Event" button. On the right, a "Checklist" section lists various tasks with status indicators. A help menu is overlaid on the right side, titled "How Can We Help?", with a close button (X) and a notification badge (5). The menu items include: Support (Get help and read articles), Product Ideas (Submit your feedback), Feedback Meeting (Help improve Givebacks), News & Announcements (Stay up to date, with a 4 notification badge), and Toolbox (Free resources and guides, with a 1 notification badge).

givebacks

GO LIVE

givebacks

Logging In

First Time Logging In?

Go to npo.givebacks.com to create your account.

First time creating an account? You can either click create an account and use your email and created password OR sign in with google or apple. The login method cannot be changed once you have logged in.

Remember to go to your email to confirm your account after creating your account if clicking 'Create an account'.

Email Address

Password

[I forgot my password](#)

Or

 Sign in with google

 Sign in with apple

By signing in, I agree to the Givebacks Privacy Policy and Terms of Use

First Time Logging In?

If your organization is on Givebacks and you're receiving emails from them already, you'll need to confirm your email address and create a password before you can sign in

Need to confirm your email address? [Resend](#)

How to Book Your 1:1 Meeting

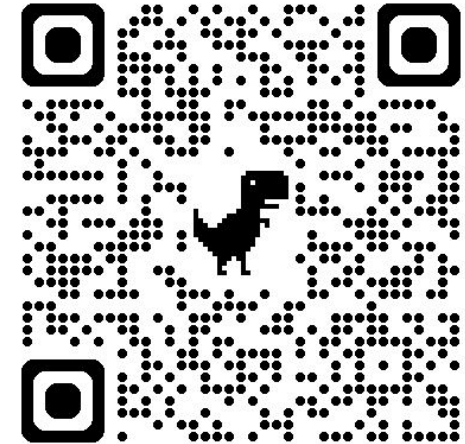
Need help with your compliance submissions?

Need help creating the fundraiser that just got approved?

Let us help!

Schedule your follow up one on one training session with Caleb Simpson to learn more about Givebacks.

All SSO's need to schedule a 1:1 session.



<https://meetings.hubspot.com/caleb-simpson>

Email questions to:
caleb.simpson@givebacks.com or
shonna.johnson@givebacks.com

^{*}givebacks

Live Q & A

***givebacks**

Next Steps:

- *Log in to Givebacks
- *Officers: Verify & Update
- *Submit Fundraising Requests
- **Store Settings/Stripe Account
- *Submit Annual Compliance Documents
- *Book a meeting with Caleb!

Remind me – what am I supposed to do again?

- [General Support Center](#)
- [Logging In](#)
- [User Management](#)
- Compliance
 - [Submit a form](#)
 - [Approve a form](#)

How to Information Sheets

- [Givebacks Fundraiser Options](#)
- [How to submit a fundraiser request](#)
- [How to Givebacks deposit into SFO](#)

- [Review Orders](#)
- [Stripe Reader/POS](#)
- [Fundraiser Creation](#)
- [Contact Support](#)
- Item Creation
 - [Adding Products](#)
 - [Custom Fields](#)
 - [Item QR Codes](#)

Teacher & Coach Training

- [Video Overview Here](#)

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Thank you!