Keela Manual Template

Created by Cedar Fundraising – yours to use & customize!

Created [Date]

Last Updated [Date]

Goals & Commitments:

1. Record all revenue received by [organization] with accuracy and according to defined procedures
2. Create an efficient contact management system that will:
    a. Improve donor stewardship & overall constituent communication
    b. Improve donor retention
    c. Acquire new individual donations
3. Create a comprehensive historical record so we can track progress and easily find information
4. Analyze data so that we can celebrate successes and make improvements where needed

Regular Housekeeping

Keela Manual

Review this manual and update as needed. Some standards and procedures will change with new functionalities, roles and needs of the organization.

1. Archive old manual by saving a copy and moving old manual to a separate folder.
2. Change the "Last Updated" entry at the top
3. Update and save

Duplicates

1. Check for duplicate contacts at least once a year and merge as appropriate.

Instructions: [Managing Duplicate Contacts – Keela]

Impact Areas

Keela info page: [Impact Areas – Keela]

Impact Areas are labels that can be applied to Donations, Revenue or Volunteer records in Keela, so you can track funds and efforts towards a specific area or cause within your business.

[Include more information on how your organization uses Impact Areas]

[Suggestion for archiving] Add an 'x' to the beginning of all "inactive" Impact Areas. Currently you cannot archive or hide inactive Impact Areas, but this is a functionality that is hopefully coming soon.

1. When setting up your systems for the next fiscal year, review the Impact Areas
2. Archive inactive Impact Areas
3. Add new ones if required

Note: The name of the Impact Area is what appears on a form if selected

Campaigns

Keela info page: [Campaigns, an Overview! – Keela]

In Keela, the word Campaign is used to describe any type of event, fundraiser, or once-off program that your Organization runs throughout the year. The Campaigns feature allows you to create new Campaigns, add descriptions, set fundraising goals, and keep track of Donations, Revenues, and Volunteering hours related to the Campaign.

[Include more information on how your organization uses Campaigns] Ongoing campaigns are:

- Annual Fund
- [List any ongoing campaigns]
- Online Event (Summer appeal)
- Back to School (September appeal)
- Year End (November-December appeal)

1. When setting up your systems for the next fiscal year, review the Campaigns
2. Archive inactive old Campaigns
3. Add new ones as per the fundraising plan for the year ahead

More Keela instructions here: How to Create a Campaign – Keela

Forms

Keela info page: Forms – Keela

Forms are stand-alone web pages or little boxes embedded into a website where a person can enter information. With Keela, all forms are connected to the database, so when information is collected it is automatically added to your files.

Keela has several kinds of forms. [Include more information on how your organization uses Forms]

1. Specific steps to set up a form examples:
2. When setting up your systems for the next fiscal year, create a new donations form for online donations.
3. Link it to the applicable Annual campaign (the new fiscal year)
4. Update/add any Impact Areas if needed
5. On first day of new fiscal year, replace old Annual donation form with the new one.

Contacts

Keela info: Contacts – Keela

Each contact profile holds detailed information about a person, from their basic contact information and relationships with other contacts to details about their donation, membership, and volunteer history with your organization.

[Organization] Rules

- Contacts may be added automatically (by forms) or manually
- When adding manually, always first check for duplicates by searching for the contact
- Merge any identified duplicates
- Contact Types to add:

- Prospective donors with at least one "Interaction"
- Email subscribers (should be automatic)
- Event attendees
- Participants who book a presentation
- Partnership contacts
- [Organization] staff, contractors, presenters and volunteers

Manually Merging a Duplicate

Since we have very specific criteria to identify duplicates in Keela, not all your duplicates may be caught by the system. You may also come across duplicates while doing some day to day tasks. That's why you can also manually merge any duplicates in Keela as you find them!

(1) Select the Duplicate Contacts

In the contact overview page, select the duplicate contacts to merge. Using the search, sort, or filtering functionalities on this page will help find the duplicates.

(2) Select Merge Contacts

When you select contacts, the Action button will appear at the top left of the contact summary. Click this and then select Merge Contacts

(3) You will then be taken to the screen to choose the fields you would like to retain

For additional instructions see: Managing Duplicate Contacts – Keela

Managing a contact

Keela instructions on how to add & edit contacts: Manage a Contact Profile – Keela

Interactions

Interactions are your go-to for all your communications with a contact! Keep track of all your communications with a contact, both online and offline, for a full history of your relationship, empowering you to take your relationships to the next level!

Some interactions are added automatically. For example, if a contact receives an eblast or submits a form response.

At [organization], we manually add the following Interactions:

- Emails - cut & paste full text with the date/time stamp included ex:
- Phone calls or meeting notes
- Grant application submitted
- Grant or any other manual donation received

Keela instructions for Interactions: Interactions – Keela

To-Do's

Use Contact To-Do's to easily organize your follow-up calls and meetings to maintain healthy relationships with your supporters.

Some examples of [Organization's] Keela To-Do's:

- Follow-up reminders
- Reports due

- Renewals due

To-Do's can be added directly to a contact's profile, or attached to an Interaction.

Keela instructions for To-Do's: [To-Do's – Keela]

Fundraising

Keela topics overview: [Fundraising – Keela]

[Organization's] Rules

- Contributions must be recorded under the "true donor"; include a soft credit if necessary
  - Example: Donation made by Jane through United Way of Calgary = donation entered in United Way of Calgary's profile, soft credit to Jane
  - Example: Donation made by Alfred, but payment comes from Alfred Business Inc. = donation entered in Alfred Business Inc. & tax receipt made to the business, soft credit to Alfred
  - Exception: If we receive a flow-through donor's email (sometimes on CanadaHelps), enter the donation under the individual's profile so that we can reach out to them and encourage a direct donation to avoid unnecessary fees. In this case, do not issue a tax receipt.
- Contributions that receive tax receipts = Donations
- Contributions that DO NOT receive a tax receipt = Revenues
- (Almost) all Donations* should have a Receipt attached to the Keela transaction (you can manually add if necessary)
  - "Flow-through" donations from United Way, CanadaHelps and Paypal have already been receipted and in some cases we won't have access to these receipts.
- All Revenue & Donations should have an associated Interaction (with back-up info attached or included such as: cheque scan, letter, wire transfer details, etc.)
  - These are automatic for contributions that come in through a form, must be manually added for all others.

Donations

Keela instructions: [Donations – Keela]

Donation Definition: a <u>charitable gift</u> made by an individual or company (cash or in-kind)

✔ Jack & Jill Smith

✔ ABC Inc. (no benefits)

× Grants

× XYZ Inc. Sponsorship

× Workshop deposits or event fees

× Service fees

× Reimbursements (GST, Co-Ops, etc)

How to log a donation: [Log a Donation – Keela]

Don't forget!

For manual entries:

- Include an Interaction & attach “back-up”
- Attach tax receipt to the transaction
    - If attaching a receipt that is already created (ie Paypal), complete transaction by selecting “Log transaction without payment or receipt”
    - Select “Upload Receipt” to complete the transaction
    - Under the Actions drop-down select “Ignore Transaction” if donation has been receipted but we do not have a copy (ie. CanadaHelps and United Way)

In-Kind Donations

See CRA information on determining Fair Market Value on non-cash gifts here

Non-cash gifts are gifts of property. They cover items such as artwork, equipment, securities, and cultural and ecological property.

A contribution of service, that is, of time, skills or efforts, is not property and, therefore, does not qualify as a gift or non-cash gift for purposes of issuing official donation receipts.

Generally, you cannot issue a tax receipt for a gift card or gift certificate that you receive directly from the issuer (ex. a donation of a McDonald’s GC from McDonalds). You can if the GC is coming from someone who purchased it and then donated it. See more info here

Revenue

Keela instructions: Revenues – Keela

Revenue Definition: non-charitable funds received as a payment for services, from ticket sales, grants, government allocations or as a part of a sponsorship agreement.

✔ Grants

✔ XYZ Inc. Sponsorship (Specific recognition)

✔ Workshop deposits or event fees/ticket sales

✔ Service fees paid to org

✔ Payments from schools or districts

✔ Reimbursements (GST, Co-Ops, etc)

× Jack & Jill Smith

× ABC Inc. (no benefits)

How to log a revenue payment: Log a Revenue Payment – Keela

Don’t forget!

For manual entries:

- Include an Interaction & attach “back-up” (if available)
- To complete the transaction without creating a receipt: first select “Log transaction without payment or receipt” then, under the Actions drop-down select “Ignore Transaction”