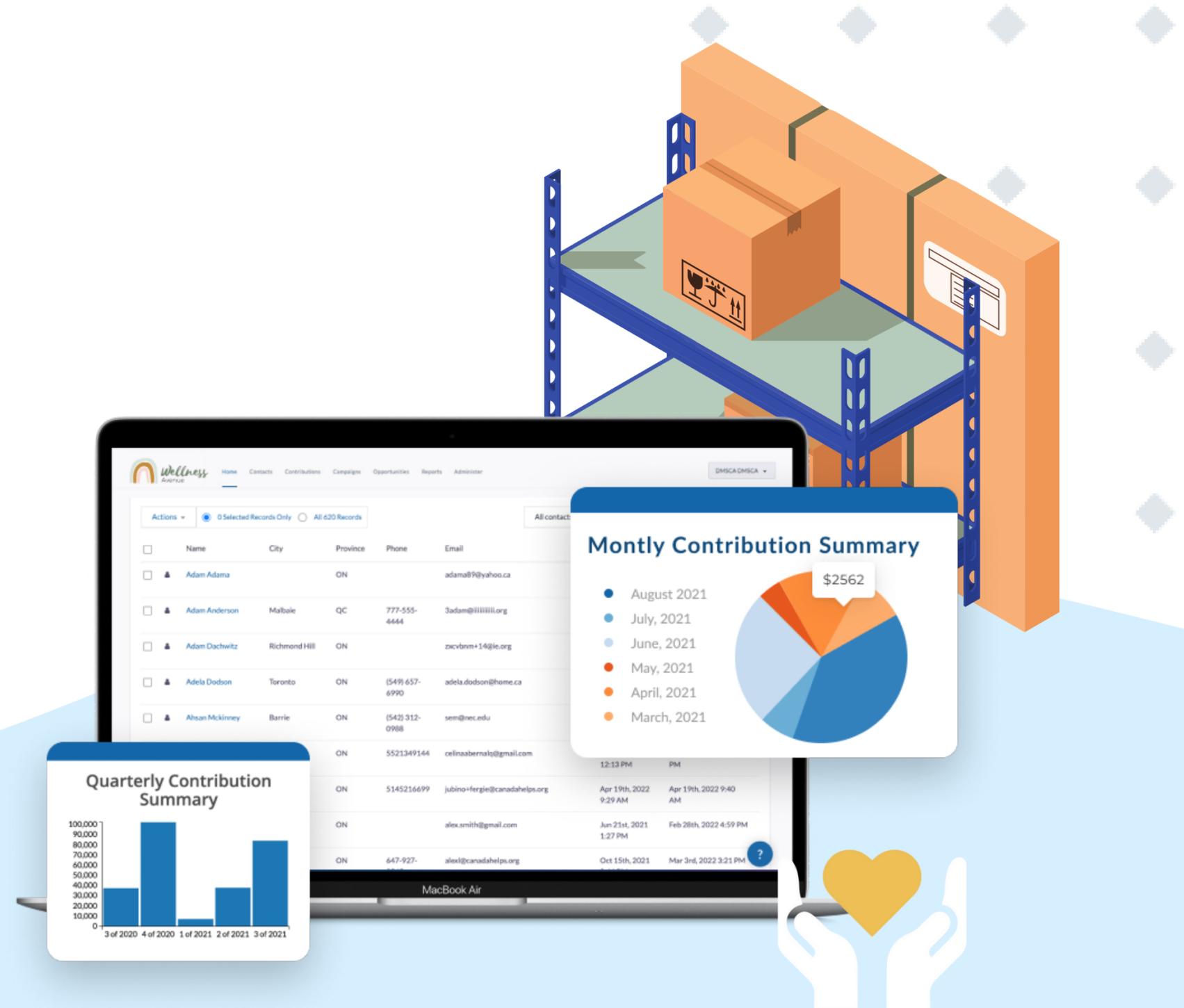




Security, Storage & Beyond For Your Charity



SPEAKER:



Lucas Froese
Senior Manager, Charity Engagement

Land Acknowledgement

Our team at CanadaHelps is grateful to have the opportunity to meet and work on many Indigenous homelands across this land we share, Canada.

As settlers on these lands, it is important to acknowledge that our Vancouver offices are located on the unceded territory of the Coast Salish People, the Montreal offices are located on Kanien'kehà:ka (Mohawk) territory, and the land on which we operate in Toronto is the traditional territory of the Wendat, the Anishinaabeg, Haudenosaunee, and the Mississaugas of the Credit First Nation.

We want to express our respect for the territories we reside in and honour the diverse Indigenous People who have lived and worked on this land historically and presently. We, the staff and leadership at CanadaHelps, are committed to being active participants in reconciliation. We are committed to continuing to amplify Indigenous voices, and learning how our work affects Indigenous People.



Source: #BeadYourProvince, Kooten Creations

About CanadaHelps

- CanadaHelps is a charitable foundation increasing giving in Canada through technology.
- **For Canadians**, CanadaHelps.org, provides a trusted one-stop destination for making donations, fundraising, or learning about any charity in Canada.
- **For Canada's 86,000 charities**, we also develop affordable fundraising technology and provide free training and education for charities so that all charities have the capacity to increase their impact and succeed in the digital age.
- Since 2000, more than 3.5 million Canadians have donated over \$2.3 billion to charities using CanadaHelps.





Have A Question?

- A recording will be emailed to you following the webinar. You'll be able to watch the recorded video on demand.
- You can hear us, but we can't you.
- Have questions or technical difficulties?
- Type them into the Chat at any time.

About the Presenter

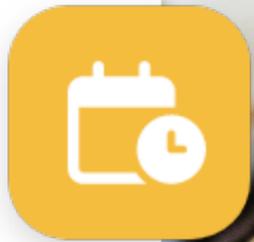


Lucas Froese

Senior Manager, Charity Engagement - Eastern Canada

lucasf@canadahelps.org

Since 2018, Lucas has been empowering charities and helping them to level up their fundraising. Lucas is at the forefront of new digital giving developments and has helped thousands of organizations build successful online giving programs.



Agenda

1. Why is Security & Storage Important For Charities?
2. Quick wins for Cybersecurity
3. Security & Storage Throughout Your Charity Processes
4. Q&A



PART 1

Why is Security & Storage Important For Your Charity?

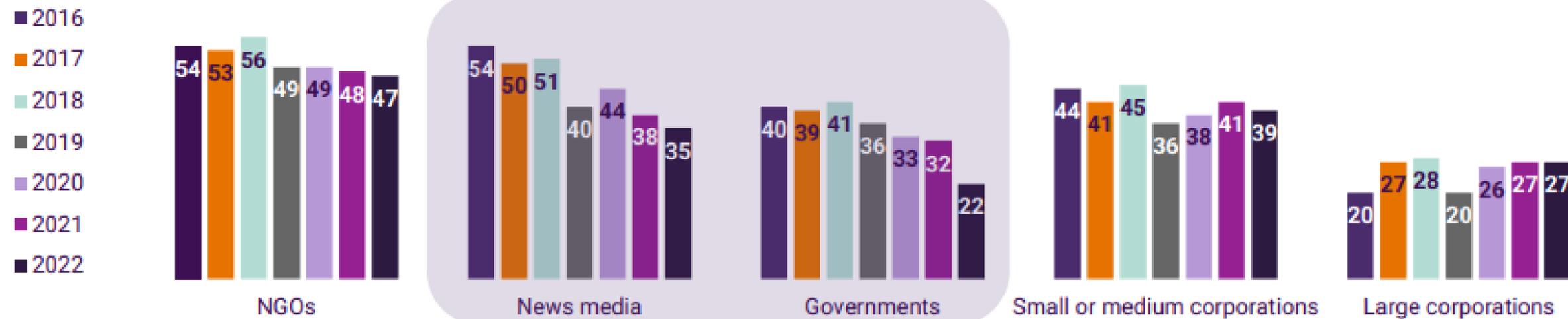


A Question of Trust

Public trust in charities has declined. Since CanTrust's first study in 2016, trust in not for profits or charities have **declined from 54% to 47% over the last 7 years.**

Our own Giving Report (2022) found that **65% of Canadians generally trust charities.** However, 16% of those that had not donated to a charity said their distrust of charities played a part in their decision.

Both studies showed that older generations are more likely to be distrustful of charities.



Cybersecurity Attacks on Charities Rising

A cyber-attack occurs every 39 seconds - cybercriminals do not discriminate.

According to Hackers for Change, charities are “often the most vulnerable targets of cyber attacks”.

- Charities have limited resources
- Outdated technology
- Lack of awareness
- Inadequate storage systems
- Employee and volunteer risks



INSIGHT

Ransomware attacks hit two Ontario children's aid societies

One agency paid \$5,000 to regain access to sensitive data, sources say, but officials say no information was ultimately lost.

By **Sandro Contenta** Feature Writer
▲ Fri., Feb. 23, 2018 | ⌚ 4 min. read

We Are Trusted With Information

We may not realize it, but we are being trusted with a lot of information.

- E-commerce information when receiving donations online or selling event tickets
- PII "Personally Identifiable Information" such as names, addresses & contact details
- Information on donor preferences and behaviours

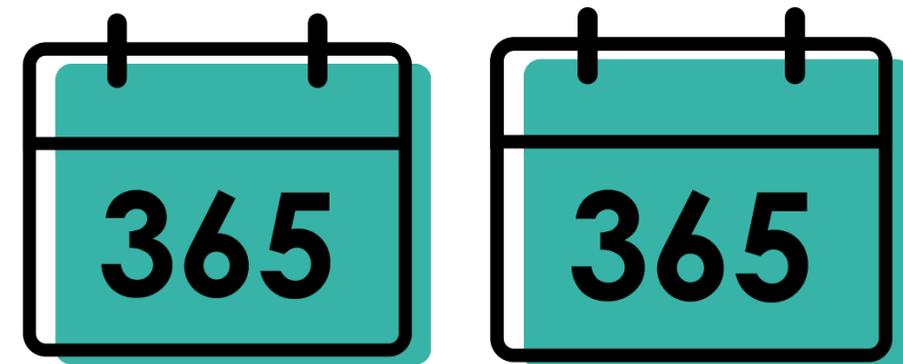


We Are Required By The CRA To Keep Records

Charities are required by the CRA to keep books and records to:

- verify revenues, including all charitable donations received;
- verify that resources are spent on charitable programs; and
- verify that the charity's purposes and activities continue to be charitable.

e.g. Official donation receipts must be kept for a minimum of two years from the end of calendar year





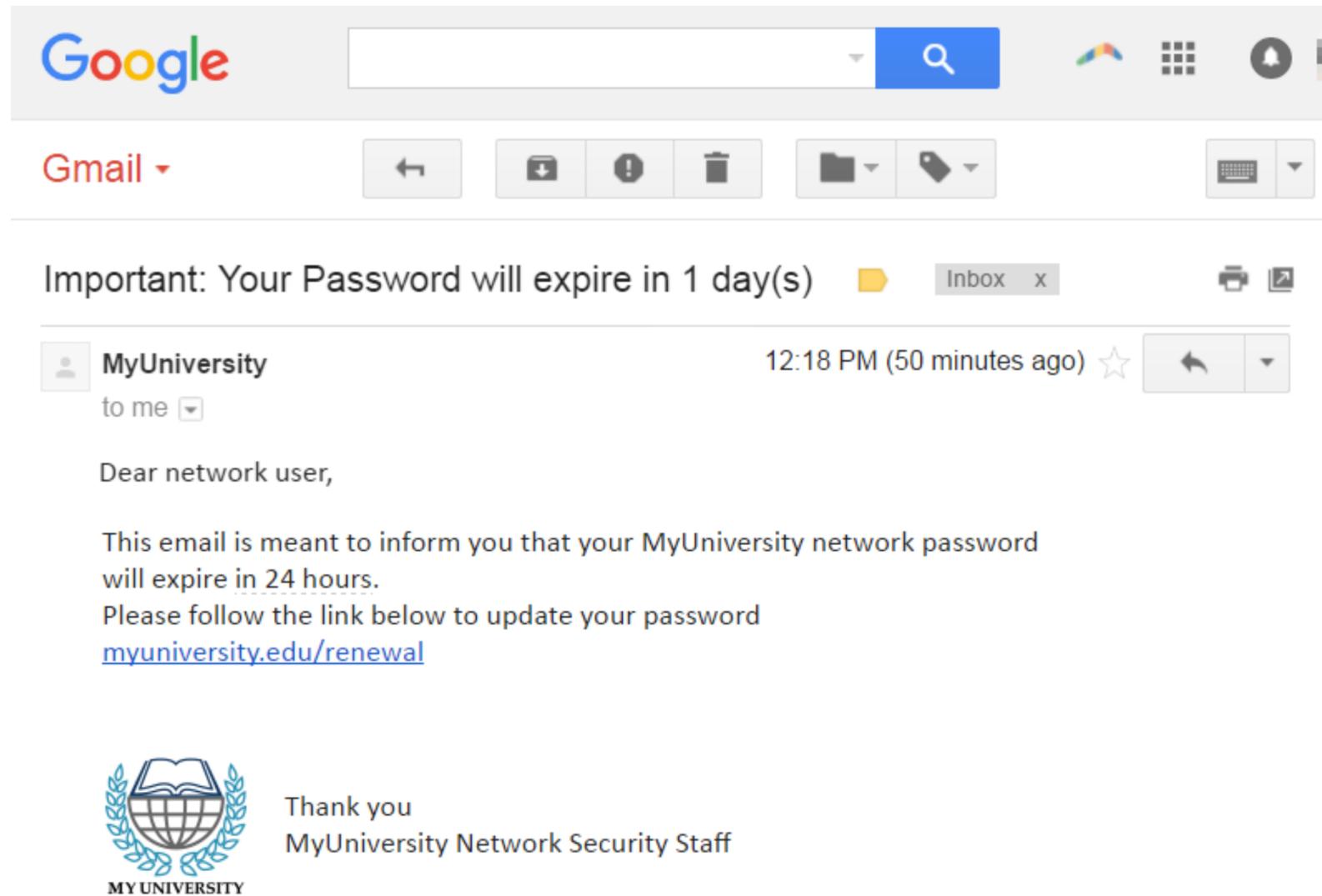
PART 2

Quick wins for Cybersecurity



Basics of Cybersecurity

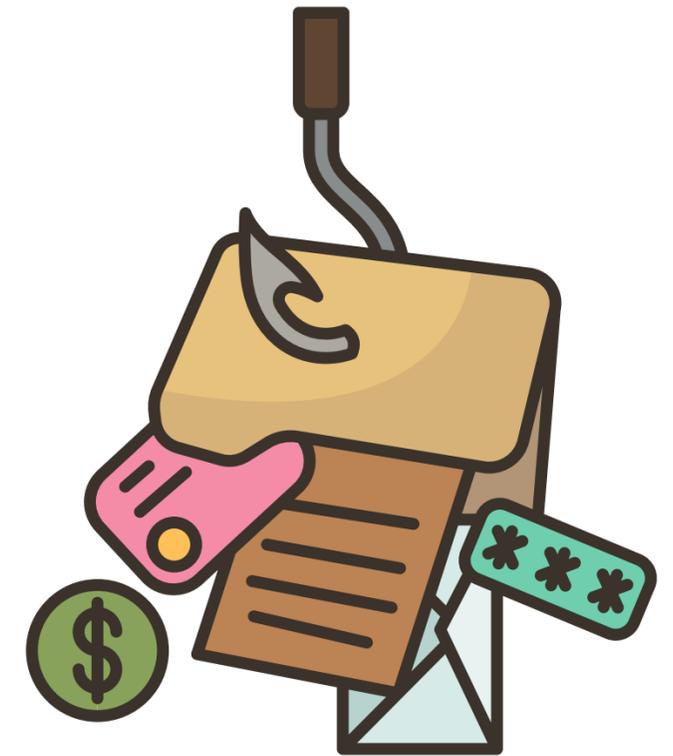
"Social engineering" is the biggest tool in a hacker's toolset and the best defence is vigilance.



Avoiding Phishing Scams

Cybersecurity starts with you and your staff. Tools only complement behaviour.

- Check the sender - is it someone you recognize? Does the name and email match?
- Be wary of poor spelling and grammar
- Be wary of messages that request urgent action or create fear
- Be wary of attachments - use antivirus to scan them before opening
- Hover over links to see if the URL is the expected address
- Report anything suspicious to manager/IT person



Top 10 Quick Wins

1. Implement 2 factor authentication or multi factor authentication where applicable
2. Do not reuse passwords - use a password manager (e.g. LastPass, 1Password etc.)
3. Pay attention when you are browsing the web - is the URL the one you expect?
4. Keep your applications, software, and operating system up-to-date
5. Don't use email to transmit sensitive data
6. Look into a basic anti-virus software, some providers offer charity discounts e.g. through TechSoup Canada
7. Look into VPN software
8. Manage access among staff, volunteers and others
9. Share security best practices with staff (and invest in training)
10. Use CanadaHelps! In our 20+ years, we have maintained a spotless security record for our charity technology





PART 3

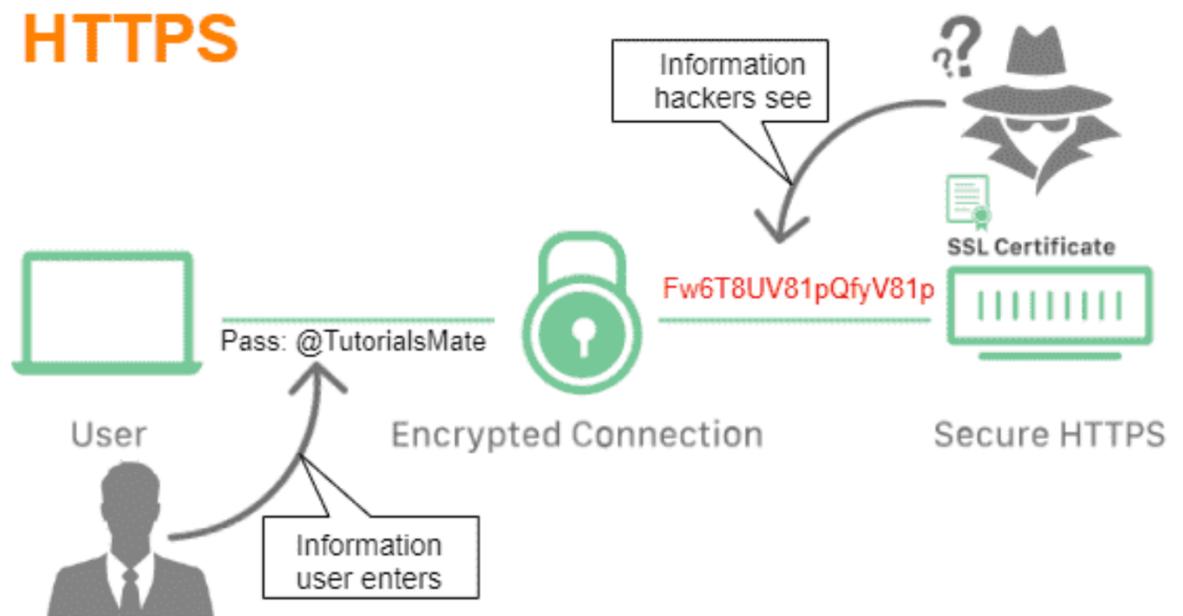
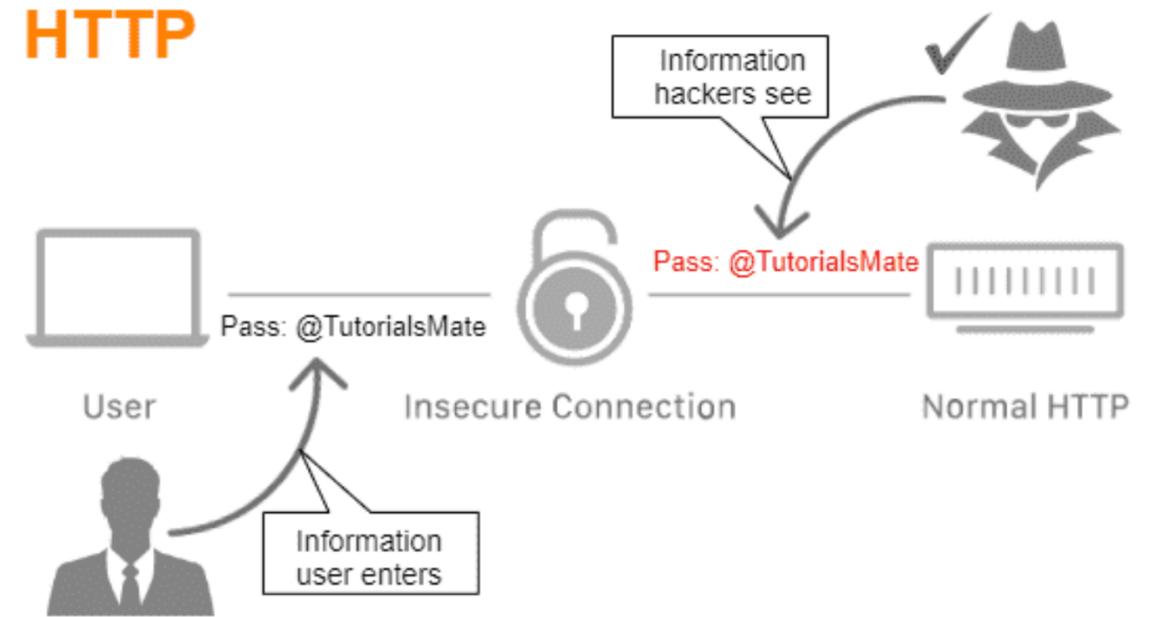
Security & Storage Throughout Your Charity Processes



Cybersecurity on your website

- SSL certificate
- Keep your website up-to-date
 - Including add-ons/plugin-ins
- Manually accept on-site comments

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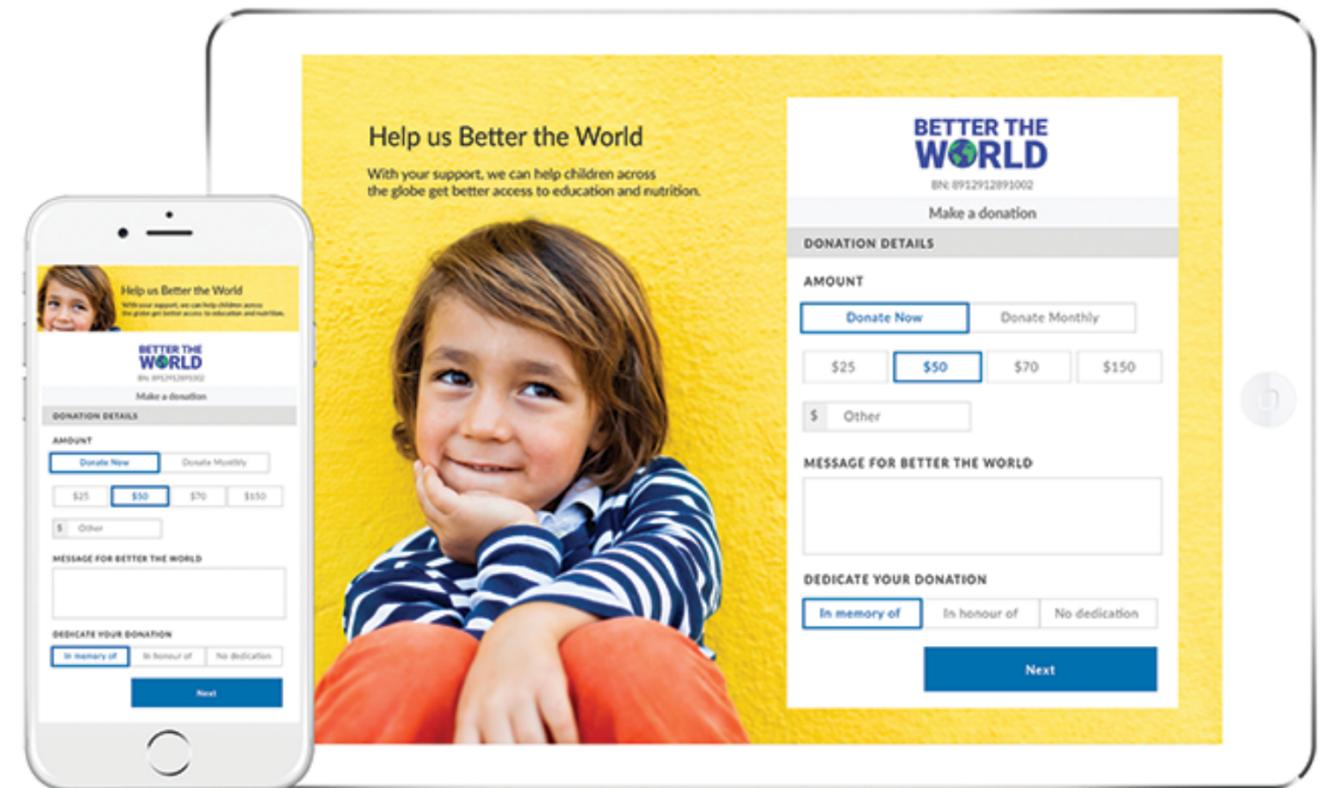


Cybersecurity for your online donations

CanadaHelps customizable donation forms are a great option.

- We ensure all data is secure, private and backed up in Canada
- We ensure payment process is secure
- We ensure we are current in all processes and standards
- We have security policies

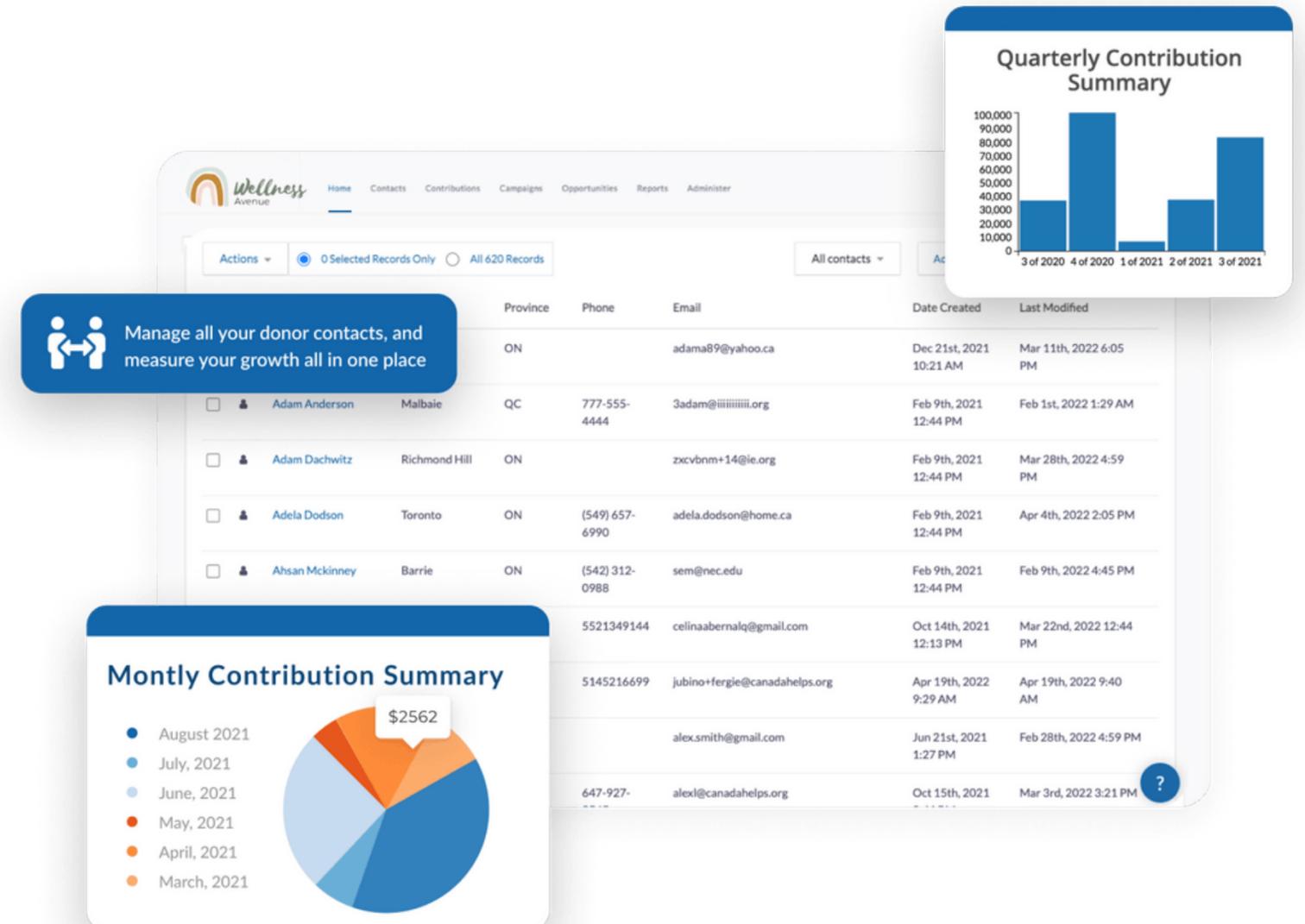
"All payment and credit card details are saved by Chase Paymentech, whose service we access using secure communication channels. Chase Paymentech uses world class security and processes 900 transactions each second – that's over 77 million transactions daily."



Cybersecurity for your donor information

Donation information needs to be tracked and stored for at least 2 years. Having physical records is a great start but there are limitations.

- Are your records safe?
- Are your records searchable?
- Are you able to collaborate?



Beyond Security & Storage

CanadaHelps Technology can support you beyond taking the burden of security and storage off your shoulders.

- Issue One-Time or Aggregate Tax Receipts with the click of a button
- Send personalized and branded CRA compliant Tax Receipts
- Send Tax Receipts by Email or Generate them for Mail
- Create mailing labels for printing on all standard label sizes
- Send Tax Receipts at a desired cadence by making use of filters

The screenshot displays a user interface for generating tax receipts. At the top left, there is a button labeled "Generate Instant Tax Receipts". The main content area is divided into several sections:

- Receipts Details:** A section with a blue header. It states "You have selected 1 contributions. Of these, 0 are eligible originals." Below this is a "Tax Year" dropdown menu set to "2022". A table shows "Contacts: 1" and "Contributions: 1". The "Total Amount" is listed as "\$ 100.00" and "Skipped Contributions" is empty.
- Thank You Settings:** A section with a blue header containing two checkboxes: "Mark Contribution as thanked" (checked) and "Send a custom Thank You Email Message" (unchecked).
- Delivery Preference:** A section with a blue header showing "Method" set to "Email".

At the bottom of the interface, there are "Back", "Preview", and "Issue Tax Receipts" buttons. A "PREVIEW" watermark is visible across the center of the interface.

- Automatically track which donations have been receipted and which have not
- Send an additional thank you message as part of generating your tax receipt
- Void and resend receipts with the click of a button
- Work collaboratively with your team from your one source of truth
- Find all of your receipt data stored on secure cloud servers, hosted in Canada



As a charity that uses CanadaHelps.org to collect donations, I love that the Canada Helps DMS has a seamless connection to the .org. We also love that Canada Helps DMS is a lot cleaner than our old software, it's relatively user-friendly, and only gets better with time.

Danielle G. from the Canadian Paralympic Committee



Q&A





Contact Us

info@canadahelps.org

1-877-755-1595

www.CanadaHelps.org

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