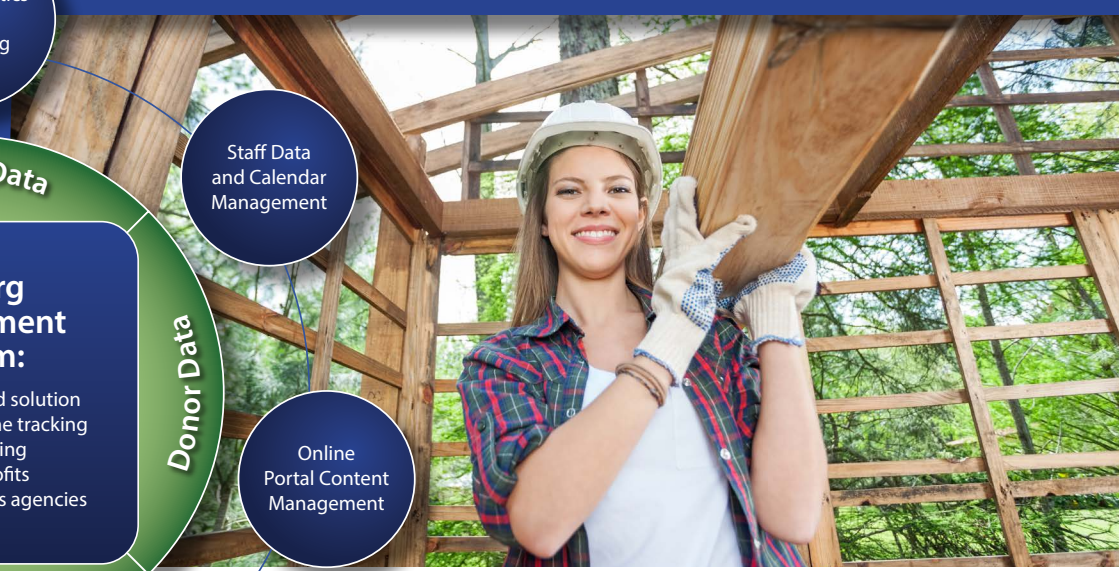
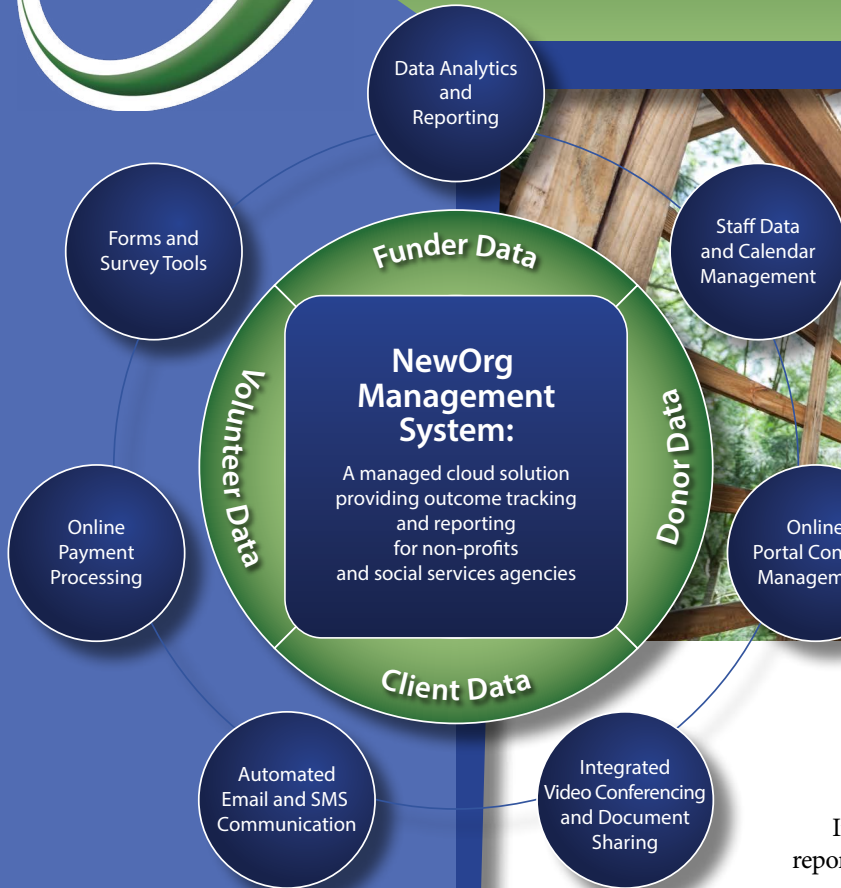


# Complete Data Management for Non-Profits: Get Control of Your Data



- Donor Management
- Donation Management
- Email & SMS Distribution
- Client Management
- Document Management
- Grant Reporting
- Productivity Reporting
- Outcome Tracking
- Scheduling
- Timesheets
- Human Resources
- Collaboration
- Integrated Video Conferencing
- MS Outlook Integration
- Web Site Management
- Event Calendar
- Online Donations
- Online Surveys

The NewOrg Management Software is designed for not-for-profit organizations looking for a way to better manage Client, Service, and Donor data, while improving productivity and reducing reporting overhead and errors.

Increasing competition for funding compels agencies to track and report outputs and outcomes more effectively as funders are requiring more complex and comprehensive grant reporting. For organizations with multiple programs and funders, data management and reporting overhead are increasing, while funds available to pay for this administration are decreasing.

The NewOrg Management System can consolidate and streamline your data management so your organization can FOCUS ON YOUR MISSION.

## Complete Data Management

The NewOrg System operates under the principle that your staff's time is valuable; data entry should be efficient and duplication of effort eliminated.

With NewOrg, units of staff activity are entered only once in a simple to use interface, including services, timesheets, scheduling, development efforts, case notes, etc. From this common data, reports for timesheets, client services, billing, grant reporting, productivity reporting, outcome reporting, and payroll can be produced.

NewOrg handles all of your programs, diverse client information, clinical documentation, donors and donations, campaigns and correspondence, and much more in a single, easy to use web interface that can be securely accessed from anywhere with internet access.

NewOrg hosts the system and takes care of all of the setup, administration, and backups, so there is no expensive hardware or network/system management.

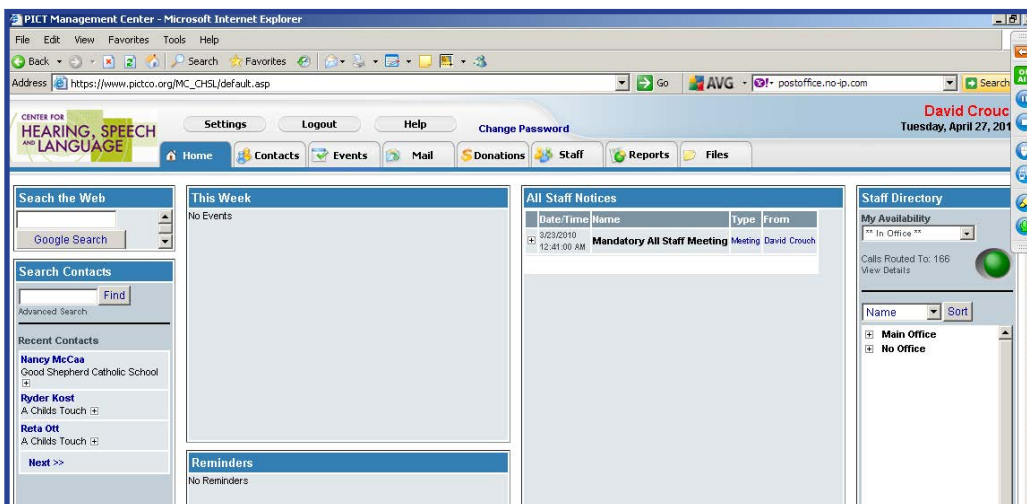
Most importantly, the NewOrg System is very customizable, so you'll never have to fit a square peg in a round hole. It can adjust as your programs and grant requirements change.

## Organizational Impact

Implementing the NewOrg Management System will benefit multiple areas of your operations. Below is a broad list of functional areas where NewOrg can be tailored to meet your unique requirements.

- **Fundraising:** If you manage fundraising events, mailings, email and SMS lists, and donations, then NewOrg can help your organization to improve communications with donors, reduce administration overhead, and empower staff to succeed in their fundraising efforts
- **Client/Services:** If you need to track clients and services for billing, grant reporting, staff productivity, and research, NewOrg has the flexibility to streamline your workflow, improve reporting, and reduce the errors and wasted time associated with managing paper records and multiple databases.
- **Grant Management:** If you need to provide regular reports to funders regarding your activities, then NewOrg can reduce the time to produce these reports and improve accuracy and flexibility. NewOrg can also export data so that it is formatted to import directly into your funder's systems, if available.
- **Scheduling & Human Resources:** If you need a consolidated scheduling environment for all of your staff and a way to track hours and activities for payroll and productivity reports, NewOrg offers an enterprise wide scheduling system with a flexible yet simple interface and workflow.
- **Web Site Management:** Maintaining a web site that's current, engaging, and relevant to your various constituencies can be challenging, even with a full time web developer. The NewOrg Content Management system allows your non-technical staff to create and manage a website in a simple to use web interface. It includes drop in components for things such as event management/

NewOrg provides a clean interface to provide a variety of management resources at your fingertips



registration, surveys, donations, news feeds, newsletter sign up and distribution, private member areas for document distribution and collaboration, calendars, photo

## Is NewOrg right for your organization?

NewOrg is designed for organizations with multiple locations, programs, partnerships, and funders. Our typical customer has between 10 and 300 employees at 1 to 50 locations.

NewOrg is flexible and can handle many lines of service including:

Therapy • Counseling • Case Management • Case Plans/Plan of Care • Donor/Donation Management • Referrals • Outpatient Treatment • Homeless Services • Advocacy • Prevention • Testing • Outcome Management/Reporting • Outreach • Volunteers

## Getting Started with Complete Data Management

The NewOrg Management Center is priced and delivered to make it easy to purchase and implement. Implementation time depends on the size of your organization, number of programs/funders, and how many functional areas you would like to address immediately.

To get started, contact us and a NewOrg Specialist will answer any questions, help define your requirements, and provide you with pricing and an implementation timeline/plan. Contact us now for details about how NewOrg can help your organization!

Important note: NewOrg respects confidentiality— all displayed screenshot contact records and service data are generated from anonymized test server data.



# Client Management

Whether your organization provides drug treatment, case management, outpatient therapy, counseling, or almost any other type of service, NewOrg can help you track clients, demographics, diagnostic information, service delivery, prescriptions, and just about anything else. This data can then be formatted for reports for funders, for operations, for productivity analysis, for payroll, and for outcome analysis.

The NewOrg Management System is built on a flexible foundation that can be easily tailored to almost any type of organization. Custom fields can be created and arranged for ease of use and permissions can be assigned so that you collect the right data for each type of client and program, and only authorized staff can access it.

Track and report on hundreds of custom data elements related to clients tailored to funder or program requirements. Track services, treatment plans, sessions, diagnostic results, referrals, pre/post tests, etc. The NewOrg System is designed to easily accommodate multiple service models for all of your programs!

All of the general features of the application are already there, we will work with your staff to implement your data, rules, and business practices. Your organization can be up and running in less than 30 days. Most importantly, our staff are there to provide ongoing assistance as your needs change. We will continue to assist when you add new services, new funders, or require new field or reports. Best of all, your staff can learn to take care of many of these changes themselves without advanced technical knowledge.

Take as much control as you like, we'll help your client/services management system grow with your organization and mission.

## Document Management

The NewOrg Management System provides a centralized document repository that allows staff with appropriate permissions to manage and access common documents and forms over the web from any location.

It also allows for the uploading and storage of documents associated with specific clients and activities. Administrators can establish types and classes of documents (intake forms, waivers, contracts, tests, treatment plans, etc) in almost any format (scanned, pdf, Word, Excel) and give permission to individual users or groups to upload and view them. This provides a permanent record of all documents and allows users to access all critical client information as needed without looking through physical files. Best of all, it is backed up off site and requires no extra storage or security on your servers.

**Contact View**

Contact Code: 58424 Contact #58424 Status: Active

Contact Info:  
 Muhammed Lopez  
 5842 Rush Drive  
 Halifax, NS B3N 2E4  
 Canada

Work Phone: 555-555-5555  
 Home Phone: 555-555-5555  
 Cell Phone: 555-555-5555  
 Fax: 555-555-5555

Role: Principal Applicant  
 Email: Lopez58424@emailaddress123.ca  
 Comm Pref:

Source: Old DB  
 Assigned To: ISANS  
 Type: Individual

Client Moved within Canada:  
 Reminder: Please ask clients if their contact information, emergency contact information and immigration status needs to be updated on the system.  
 Contact Info Updated: 7/4/2018 1:25:20 PM  
 Old Categories to Fix: 1

Photo:  
 ExchangeID: 34127  
 Current Age Range: Senior 55+ years  
 Birthdate: 7/27/1965  
 Settlement Stage: Settlement Over 1 Year  
 CLB Listening: PB  
 CLB Speaking: PB  
 CLB Reading: LA  
 CLB Writing: LA  
 CLB Assessed By: Instructor  
 Date of language assessment: 06/14/2019

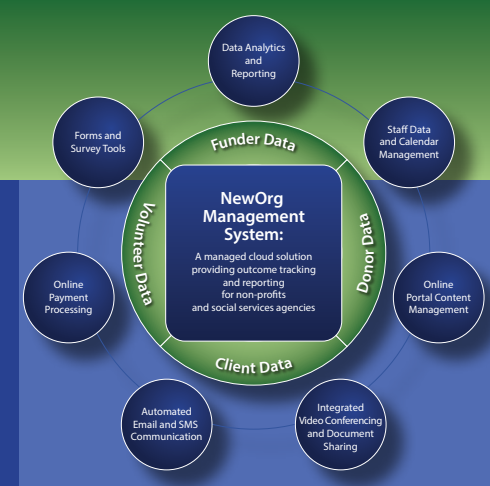
More Contacts | Events | Donations/Payments | Education Work Experience Indicators Checklist

Search

Assigned To: [Select from list...]

Date: [mm/dd/yyyy]

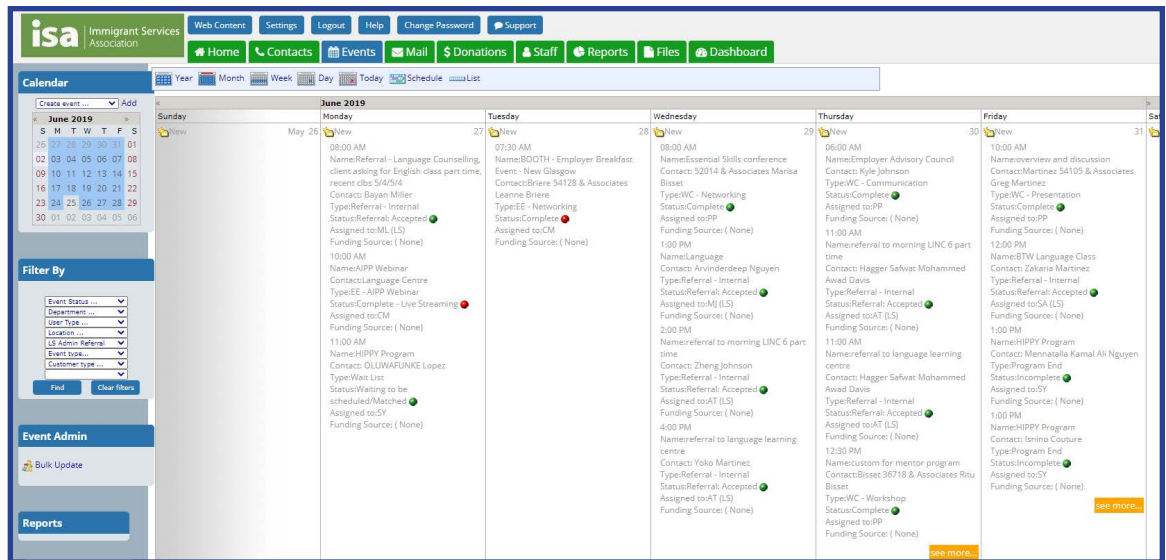
Date	Event Name	Assigned To	Type	Names	Pre-Appr
07/17/2019	iComm - ESW	E & B, Employment Series Coordinator, Haley Glenn	Interpretation	Muhammed Lopez	
07/09/2019	Follow up / home visit	Resettlement, Settlement, Shahnaz Sobhani	RR Service	Muhammed Lopez	
07/03/2019	Referral to the employment series	E & B, Employment Specialist, Ann Borross, HG	Referral - Internal	Muhammed Lopez	



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Track program delivery and progress on a client-by-client basis.





Events compile into a calendar overview, allowing scheduling to correspond to compliance deadlines and programmatic needs

## Scheduling & Human Resources

Imagine a simple, single interface for staff to record and manage their time for all of the activities they perform, with ties to payroll, the web, clients, donors, services, and events. It reduces data entry, reporting, and administration overhead, while giving your staff instant access to the information they need to serve your constituents and manage their time.

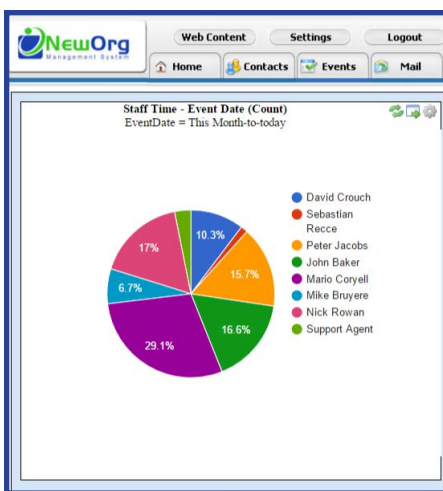
The NewOrg Management System is designed to be a central repository of your organization's data. To be effective, it must be a part of your staff's daily routine. NewOrg provides all of the standard scheduling features you would expect as well as group scheduling, recurring appointments, permission based case notes, time tracking, and all staff notices and meetings.

With an easy to use calendar interface and highly customizable fields, NewOrg allows your staff to easily manage their schedules and record important client and activity information which can then be used for reporting purposes. No more entering appointment and session information in two or three places.

Additionally, appointments recorded in the NewOrg calendar can also be added to user's Outlook calendars and exported to spreadsheets or other formats.

Standard functions such as reminders, recurring events, and multi-staff, multi-client or multifunder events, give you the flexibility to record and manage any type of activity. Document mileage, parking and toll information to ensure accurate billing and compensation.

Your staff perform many different types of activities, many of which require specific detailed information. NewOrg allows administrators to define custom fields based on the type of activity to ensure all relevant information is captured for reporting. Calendar events can be tied to the organization's web site for online reservations, public event calendar, partner calendar and collaboration.



Track staff time on specific cases

Important note: NewOrg respects confidentiality— all displayed screenshot contact records and service data are generated from anonymized test server data.



# Donor Management

## Whole Organization Fundraising

The NewOrg Management System not only tracks donors, donations, events, and campaigns. It empowers all of your staff to participate in and contribute to the fundraising process.

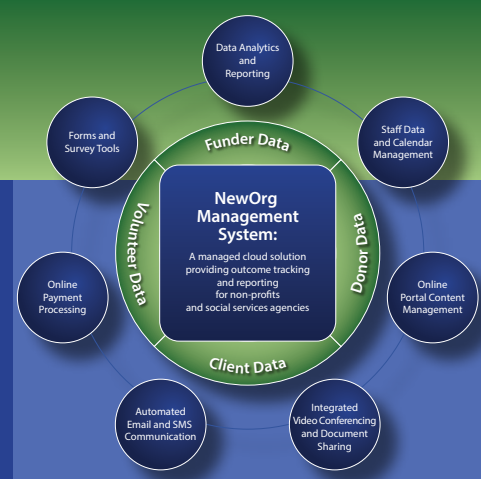
Let your most knowledgeable and committed staff become successful outreach and fundraising experts, without taking time from their mission critical activities.

## Donor Management Highlights

With easy to use tools and reports, your development team will have easy access to donors and prospects, be able to quickly gauge the success of campaigns, and be able to standardize correspondence and communications with donors, specific to their profiles.

NewOrg allows for targeted tracking and communication with all of your donors. Send personalized updates, thank you letters, and receipts either by mail, email or SMS with a few clicks.

- Create approved letters and templates for staff to send out via Email and Mail.
- Manage and track all outgoing correspondence with donors.
- Group donors and prospects based on interest, demographics, etc and target campaigns and correspondence to the appropriate people.
- Record attendance and participation in events, meetings, and promotions.
- Track donations by event or promotion and type.
- Color graphs and reports.
- Manage pledges and scheduled giving.
- Accept online donations.
- Report on and analyze donor activity and campaign success.
- Automatically produce and send receipts and thank you letters.
- Fast and easy bulk entry of donations.
- Post donations to your financial system.



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The screenshot shows the NewOrg email template editor. The main content area displays a template for "Build Day Confirmation" for "Homes for Humans - Build Day Confirmation". The template includes a subject line, a thank you message, a safety video link, a work day schedule, and a list of items to bring. The interface also includes a search bar and a statistics table.

Personal	Allowed	Sent	Printed
Today:	100	0	0
This month:	3100	0	0
YTD:	36500	2	0

Company	Allowed	Sent	Printed
Today:	0	0	0
This month:	0	0	0
YTD:	0	2	0
Remaining credits:		0	

Use NewOrg's email template tools to create effective email campaigns for funding and other support.

Manage events, newsletters, thank you letters, receipts, and appointment correspondence from the same easy to use interface.

**SMS Texting:** Adding to the robust existing mass email tool set built into the NewOrg Platform, organizations can extend their outreach to clients, donors and volunteers via NewOrg's SMS texting capabilities. Provide automated responses, updates, reminders, notifications, newsletters, and forms/survey links directly to your clients, volunteers' or donors' cell phones. Automating these processes can be quickly and easily implemented by your staff using sets of pre-existing templates built for your organization.

**NewOrg Messaging Center** Manage internal messaging with your colleagues, create custom groups to communicate with your team in NewOrg. Share contacts, events, forms, surveys, and print forms with other staff in an easy, quick way. Improve communication, administrative and operational tasks using NewOrg's internal messaging system.

## MS Outlook Integration

NewOrg integrates with your MS Outlook client so that you can view your NewOrg contact and calendar information from Outlook in real time. Decide which groups of contact and events to synchronize so your staff has access to all the data they need without compromising security and confidentiality.

## Email & SMS Distribution

NewOrg makes communicating with large constituencies simple, auditable, secure, and easily customizable.

The NewOrg integrated list management and email system allows specified users to send targeted email messages to any cross section of your database. Permissions for email allow different users access to different people and all emails are tracked and recorded.

Appropriate users can manage large email lists, create standard email templates, send email to large lists based on any criteria defined about contacts such as events they have attended, past donation history, physical address, income level, interest areas, predefined groupings, or any other custom field.

Templates can be made available to different users to ensure a consistent message and quality of content.

Contacts without email addresses can be sent SMS or physical mail automatically from the same interface.

Export contact lists to use in mail merges, invitations, or to send to a printer.

Combine your mail list, email lists, event registration list, donors, and clients. Let the appropriate users send correspondence to each group in the most appropriate ways and watch the results.



# Reporting

Funding organizations, both public and private, continue to increase the level of reporting they require of funded agencies. This places strains on the administrative staff at many organizations as they struggle to track and report on many different elements for multiple funders. Entering the same data several times has become common. Maintaining accurate statistics, prepared in a timely fashion is challenging without a central repository of all client, staff, and service information.

NewOrg addresses these issues by centralizing all organizational activities and providing each staff member with appropriate access to enter, maintain, and report on their daily activities. NewOrg supports an almost unlimited capacity to store and manage custom information.

With some basic training and quality assurance procedures, this information can then be used to compile reports for funders, to track performance against grant requirements, and to maintain billing information.

NewOrg's custom report builder allows our staff or your administrators to develop a wide variety of reports covering all aspects of your organization's business processes. These can be tailored to meet specific funder's data requirements and even be used to upload to funder's systems.

The NewOrg System can help your organization reduce the time and overhead associated with Grant Reporting by up to 80%, while improving transparency and helping management gauge progress towards grant related and organizational goals.

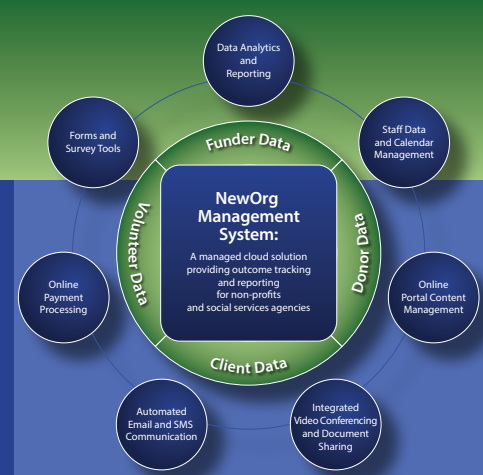
Let your managers focus on your mission, with tools to monitor performance and success.

## Productivity Reporting

Providing managers with immediate and meaningful insight into organizational effectiveness and productivity is a core part of the NewOrg Management System's features. Importantly, reports and statistics can be tailored to each organization, department, and manager.

NewOrg lets your supervisors and executives track the performance and productivity of all aspects of your operations. This operational transparency allows your organization to better allocate resources, adjust to market trends, and evaluate performance.

Get the information you need to make critical decisions, obtain funding, evaluate programs and staff, report to funders, and tailor your services to changing needs. A centralized NewOrg System provides these benefits without requiring additional data entry.



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# Outcome Tracking

Being able to identify strengths and weaknesses in your services and delivery model can impact all areas of your organization, from programs to fundraising.

NewOrg lets you define the services, issues and outcomes that are key to your mission and then create reports which reveal the results of your efforts. Drill down into specific cases or view multi-year summaries of your changing services. Flexible and accurate outcome reporting will give your organization the intelligence it needs to adapt and improve while providing your staff with the information funders are requesting.

One of the key advantages to NewOrg's comprehensive platform is the analytics generated, allowing managers and program heads to view performance and measure effectiveness on multiple levels.





## Exporting Data

The NewOrg system allows you to create reports and lists which can be exported to other formats such as Excel, tab delimited, and flat files. This allows you to send reports and the underlying data directly to funder's systems, import service information into a billing or accounting system, or analyze the data in other software such as Excel or SPSS. Whether you need line by line details or are creating color graphs for an annual report, NewOrg has the data and simple ways to get to it.



**Volunteer Hours** Active Report Saved Criteria

Names:  Type: Drug Prevention Activity | H4H - Build Day (Group) | H4H - Build Day (Open) | H4H - Restore Shifts | Transportation | Event Date: 07/01/2017 | Find | Reset

Volunteer hours by date range and type. Re-filter by Event Type and Gender.

List | Summary

### Volunteer Hours (Summary)

**Grouped By Names**

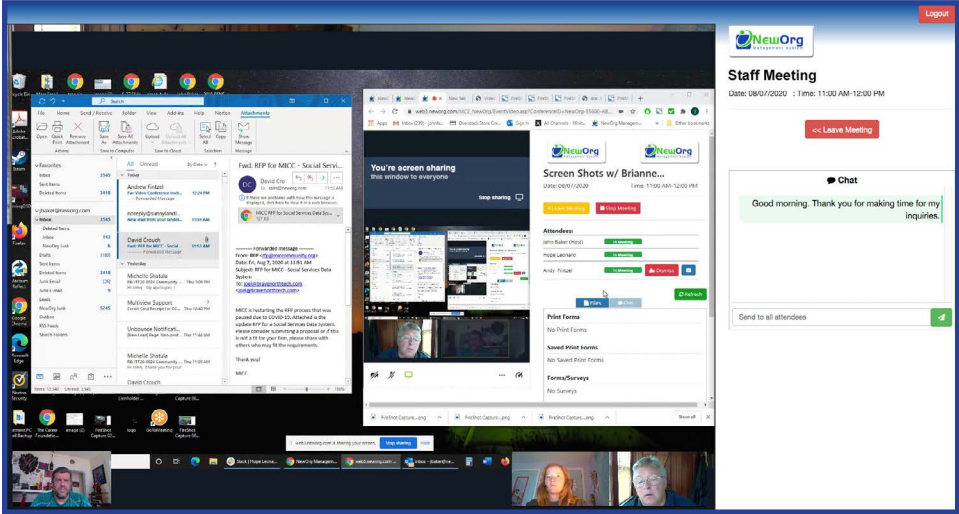
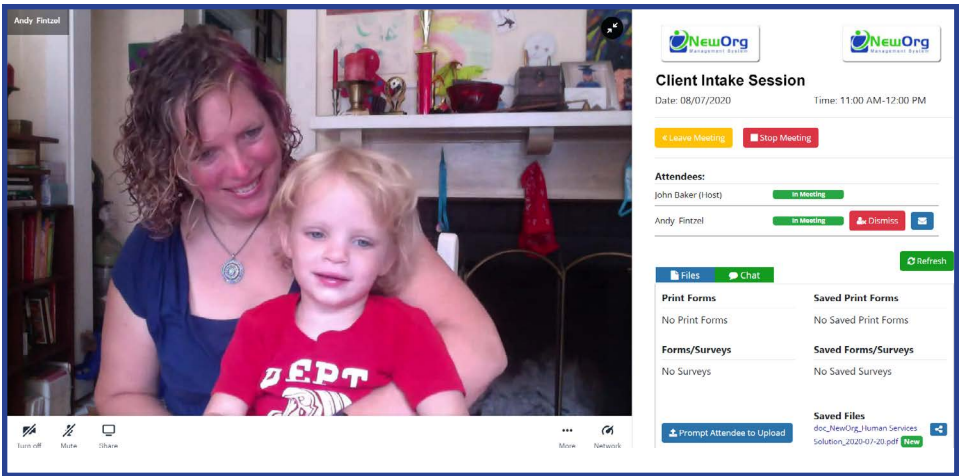
Names	Count	Hours (Sum)
Bill Gates	1	9.00
Bruno Mars	1	7.00
Dick Cheney	1	7.00
Fred Leader	1	7.00
George W Bush	1	7.00
Highview Elementary School, John Beltran	2	13.00
Jane Rose Brenner	1	3.50
Jimi Hendrix	1	7.00
Jimmy Carter	1	2.00
Jimmy Hoffa	1	0.02
Jorge Baker	1	4.00
Josh Dunn	2	14.00
Juan Pablo	1	7.00
Juan Valdes	1	9.00
Karen Lopez	1	9.00
Katy Brenner	1	3.50
Lance Armstrong	2	16.00
Marco Rubio	1	7.00
Mary Violet Brenner	1	3.50
Matthew P Brenner	1	3.50
Miami Gardens 2 Build Site:	1	7.00
Oracle Larry Ellison	1	3.50
Pulp Fiction Productions: Samuel Jackson	16	105.02
Richard Bend	1	7.00
Sandra Bullock	2	16.00
Susan Boyle	2	14.00
Ted Cruz	15	56.29
Tony Robbins, Inc.: Tony Robbins	5	35.00
Trump Holdings: Don Trump	2	16.00
US Congress: Mr. Bernie Sanders	18	116.02
USA: Barack Obama	2	16.00
USA: Hillary Clinton	6	42.75
<b>Total (Distinct: 32)</b>	<b>94</b>	<b>573.60</b>

Add to Dashboard

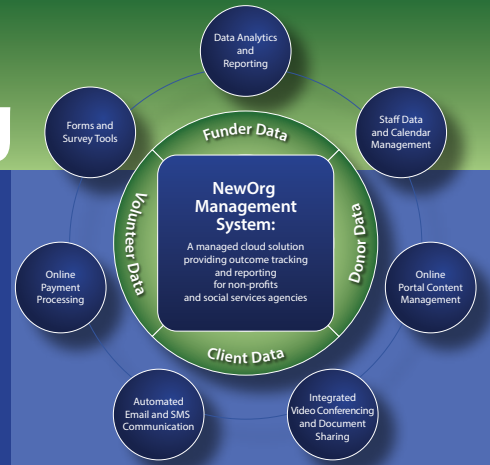


# Integrated Video Conferencing

In this current environment of social distancing NewOrg has recognized the need for organizations to provide Services and conduct Client and Staff meetings remotely. The NewOrg platform now provides Integrated Video Conferencing to meet these challenges. Meet with your clients and staff members remotely via audio or video conferencing sharing while your computer or mobile device screen with the attendees.



The ultimate multi-functional tool, NewOrg's video conferencing component provides a user-friendly interface to maximize remote communication. Built-in features include chat and multiple screen sharing.

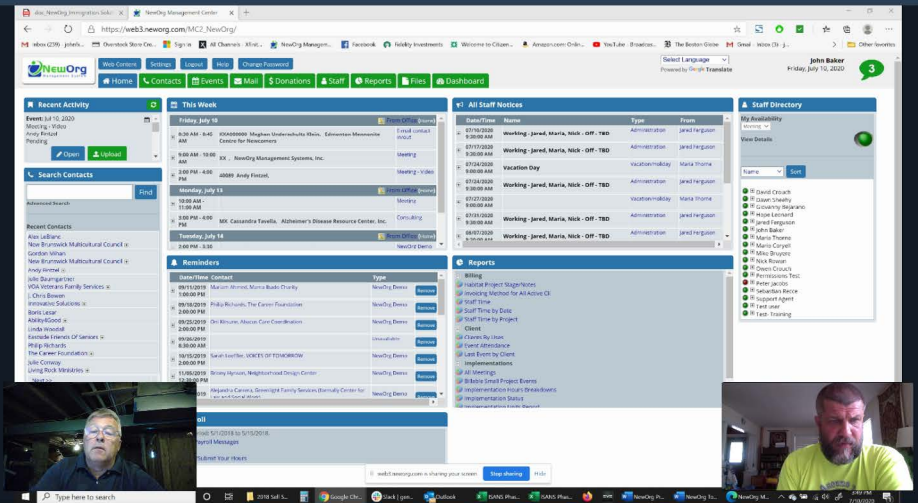


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You're screen sharing  
this window to everyone

Stop sharing



Date: 07/10/2020

Time: 3:00 PM-4:00 PM

← Leave Meeting

Stop Meeting

Attendees:

John Baker (Host)

In Meeting

Andy Fintzel

In Meeting

Dismiss

Refresh

Files Chat

Print Forms

No Print Forms

Saved Print Forms

No Saved Print Forms

Forms/Surveys

No Surveys

Saved Forms/Surveys

No Saved Surveys

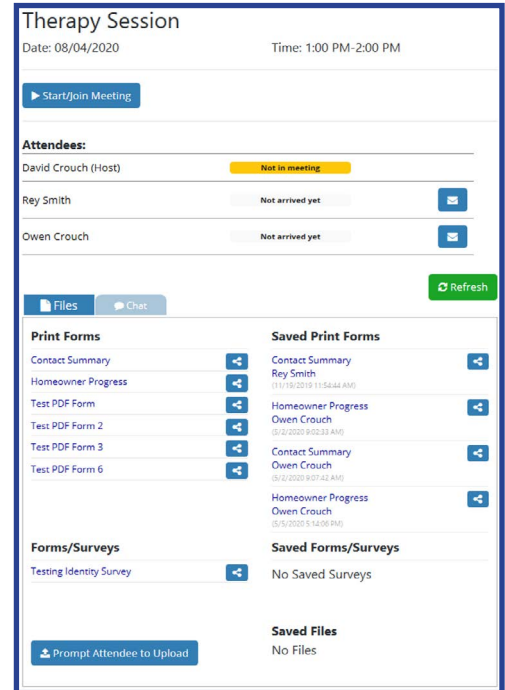
Prompt Attendee to Upload

Saved Files

No Files

- Video conference setup is easy and launches straight from events you have created in NewOrg.
- Multiple camera formats, and gallery views for all attendees.
- Share NewOrg assessments, surveys, and print forms to client and obtain electronic signatures.
- Video conferencing participants can share and upload documents or picture of documents that can be prompted in meeting by the case managers and frontline staff.
- Documents uploaded in meeting can be saved in real time to the client record saving your staff time and ensuring documents are linked to the client's record.
- Cut down on the time required to correspond with your clients via email.
- Reduce waiting time for key service document to be completed before services can begin.
- One simple meeting invite link to the "NewOrg Video Conferencing Center" for your contacts. This allows staff add invited to existing automated or manual email templates and texts to invite clients to attend the meeting, minimizing setup time.
- No 3rd party video contract.
- All meetings, file sharing and signatures are securely conducted and stored within your NewOrg System, HIPAA/PIPEDA compliant.

Also provided in the new video conferencing feature is the capability to share meeting documents in real time.



Meetings initiated through the NewOrg video conferencing feature allow host to prepare forms and other documentation in advance of the session, making it a powerful tool in dealing directly with clients, staff, volunteers and other stakeholders.



## Company overview:

NewOrg Management System, Inc. designs and develops outcome management systems for social services organizations and governmental agencies providing community services. NewOrg is a cloud-based, client management and reporting database that is professionally implemented to provide tailored turn-key solutions that support Case Management, Client Services, and Volunteer Programs; assisting staff, managers, and executives to track and attain progress towards targeted outcomes in employment, health and social services goals; and support services to children, families, the disabled, seniors, homeless populations, and communities. NewOrg also supports government agencies to realize wide ranging impact through their work with service providers, referral partners and other agencies; NewOrg allows social services organizations to spend less time on compliance and funder reporting, and focus on the delivery of services to their constituents. NewOrg Management System, Inc. serves nonprofits and public sector organizations worldwide. The company was founded in 2006 and is headquartered in Washington DC.



Toll Free: 1-866-843-2835 | Email: [sales@neworg.com](mailto:sales@neworg.com) | Web: [www.neworg.com](http://www.neworg.com)

Certified



This company is committed to  
accountability, transparency,  
and continuous improvement.

Corporation