

SDP ASO

# Your centralized and simplified management



[www.sdp-aso.com](http://www.sdp-aso.com)



# SDP, WITH YOU FOR 25 YEARS

At SDP, we are proud to work with non-profit organizations. This commitment has shaped not only how we design our platform, but also how we support and accompany the organizations we serve. Many members of our team come from the non-profit world themselves and bring with them a deep understanding of the daily realities, challenges, and values that drive organizations like yours.

Our approach goes far beyond simply offering a digital solution. We view each partnership as a long-term relationship based on trust, transparency, and human connection. We remain present and committed to our clients throughout their journey, ensuring they feel supported every step of the way. For us, technology is just a tool; what matters most is the impact it has on the communities you serve.

Over the past 15 years, no organization has chosen to end its collaboration with us. This track record reflects the trust we have built, the reliability of our solution, and the care we take in every relationship. It also reminds us that when we partner with an organization, we are fully invested in its mission, success, and long-term sustainability.

At SDP, we are proud to define ourselves as a human-centered company serving humans. Our mission is not only to simplify operations, but also to empower nonprofits to focus on what really matters: providing meaningful services and changing the lives of their community members.

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*A people-oriented company serving people.*



# THE BENEFITS OF ASO

Regardless of the size or sector of your organization, ASO offers numerous benefits. Whether you want to simplify file management, centralize information, automate certain tasks, or produce accurate reports, ASO adapts to your needs and makes your teams' daily work easier. Its flexible approach allows each organization to get the most out of the solution while optimizing time and resources.

## **SIMPLIFICATION OF FILE MANAGEMENT**

Digitize and centralize all information relating to beneficiaries and interventions for effective and structured monitoring.

## **OPTIMIZATION OF WORKERS' TIME**

Reduce administrative burden with an intuitive interface that provides quick access to essential information.

## **DATA COMPLIANCE AND SECURITY**

ASO complies with the strictest standards for personal information protection and ensures secure data hosting.

## **REDUCTION IN OPERATING COSTS**

By optimizing processes and reducing manual tasks, ASO helps lower administrative costs and improve your organization's financial efficiency.

# Overview of ASO modules



## What is an ASO module?

A module is a specific ASO feature that can be activated or deactivated depending on each organization's needs. This approach allows you to customize the solution and use only the tools that truly support your activities.

The list of modules described below is available à la carte: each organization chooses the ones that best suit its needs.



# Accommodation management



This module helps you track accommodation requests from the moment of initial contact. It manages eligibility criteria using forms and creates waiting lists when places are limited. Once a place becomes available, you assign a room and plan the stay. Resident information is recorded, allowing you to generate activity reports and occupancy rates in real time. You can also analyze resident departures and adapt your services accordingly. For example, if a high number of departures are related to the same cause, you can adjust your offering or provide additional support.

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# Schedule and time management



This module is used to organize your employees' schedules. You create schedules based on shift templates, and the system generates the corresponding timesheets. Employees can submit adjustments or overtime requests, and you approve their requests while taking into account time banks and seniority. For staff who need to travel, the module also allows them to report travel expenses. It manages replacements by giving employees the option to request or offer a replacement. Reports detail attendance and absences, and a mobile app accompanies staff in the field. A concrete example: you can view an employee's timesheets and approve their overtime after a night on emergency duty with just a few clicks.

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# Donations and grants



The donations and grants module allows you to record financial or material contributions received. Each donor has a file with their contact information and a history of their contributions. The module generates tax receipts and provides you with dashboards that show the amounts collected and the source of the donations. For example, if a local company donates computer equipment to you, you enter it with its estimated value and can then issue a certificate to send to the company.

# Training management



This module simplifies the planning and monitoring of staff training. You create training programs by specifying the objectives and skills to be acquired. Participants and trainers can add comments after each session to document progress. The system also keeps track of certifications obtained and skills developed. Finally, an electronic library stores the documents and resources used during training. A good example is organizing a session on crisis management: you plan the dates, add the teaching materials to the library, and track the progress of participants until they obtain their certification.

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# Follow-up management



Follow-up management module documents your users' interventions and files. The module schedules follow-up calls and visits, then assigns these follow-ups to available staff members. A history log keeps track of contacts and actions taken for each person. It is also possible to manage multiple programs and budgets in the same database, while maintaining separate statistics for each program. For example, a staff member can see all the follow-ups scheduled for the week and consult the notes left after each call.

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# External services



This module centralizes service requests from people outside your organization and assesses their eligibility. Once the request is accepted, you can track the interventions carried out in detail. You can schedule meetings, cancel or reschedule appointments, and assign follow-ups based on each person's workload. For example, when you receive a request for mental health support for a parent, the module helps you schedule support appointments and track the situation's progress.

### Food aid

The food aid module handles the organization of food aid. You register participants, record their attendance at distributions, and enter food donations from individuals or businesses. It also helps organize group activities such as cooking workshops or nutrition classes. Finally, it generates detailed reports on distributions and beneficiary profiles. For example, you can analyze how many food baskets were delivered to families in three months.

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### Managing clinical aspects

This module allows you to manage your beneficiaries' clinical files. Each person has a file containing their history and needs, and you document the interventions and follow-ups performed. The module also facilitates the handling of incoming calls by providing a framework for directing users to the right service and storing the information collected. You maintain intervention plans with objectives, recommendations, and results for each beneficiary. For example, after a follow-up session, you can enter the agreed-upon recommendations and schedule the next meeting.

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### Activity management

This module is used to plan activities for your various programs and track participation. You create calendars for each event, register participants, and measure attendance rates. The required resources, such as equipment, facilities, or staff, are planned, and a detailed report on each activity is generated. For example, you can organize an educational outing, reserve a bus, and then check the number of participants to assess the relevance of the activity.

# Member and volunteer management

Member and volunteer management simplifies membership with interactive forms. Each member has a file that keeps track of their involvement and the activities they have completed. You can also track the training your volunteers have completed to ensure they are ready for their assignments. For example, a new volunteer can register online, and you can immediately see what activities they have completed and what training they have finished.

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## Triage

This module simplifies the management of incoming requests. Eligibility criteria are managed by dynamic forms that ensure accurate screening in accordance with current standards. The module assists workers when taking initial information over the phone. You can manage multiple programs and budgets in the same database, and statistics for each program remain separate. It also helps organize waiting lists for different programs. For example, if a person applies for two different services, you can add them to the relevant programs and track their place on each waiting list.

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## Human resources management

This module brings together all information relating to your employees. It includes a file for each employee with their contact details, position, and professional history, as well as their skills and training. You can store important documents such as contracts, codes of ethics, and certificates. The file also shows the history of positions held and the conditions associated with each job. Confidential notes can be added, accessible only to authorized persons. For example, you can view an employee's entire career path, from their hiring to their current position, and see their current training.

### Day nursery

The Day nursery module makes it easy to manage registrations. You can record parents' contact information and each child's specific needs. It organizes the schedules and availability of educators and staff. You can plan and record educational and recreational activities for the children. Finally, it generates reports detailing registrations, activities, and statistics on the children enrolled. For example, you can see how many children participated in a motor skills workshop and adapt future workshops based on their participation.

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### Respite

The Respite module is designed to manage respite projects. You can track project progress, allocate the necessary number of hours, and generate the associated invoices. The reports produced detail the number of hours used, expenses, and results obtained. For example, if you offer a respite service to a caregiver for ten hours per week, the module allows you to record these hours and send the appropriate invoice.

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### Community garden

The Community garden module makes it easy to organize your community garden, chicken coop, or flower crops. You can plan production, track tasks to be completed, and optimize the use of your resources. It also allows you to record harvests throughout the season and keep track of your stocks of seeds, tools, and harvested products. For example, you can plan your tomato seedlings for the spring, track their growth, and record the quantity harvested in the fall.

### Resource directory

This module centralizes all the resources useful to your organization in a single, easy-to-use tool. Each resource is recorded with a detailed file including its contact information, services offered, and related topics. You can quickly access information by searching by region or topic and using intelligent thematic classification. For example, if a user needs legal services in their region, you can find and share the information in just a few clicks.

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### Evaluation grids

The assessment grid module helps you measure your participants' progress using interactive and customized tools. You define your criteria, assign weights, and automatically obtain a final score accompanied by a color code for quick reading. The centralized history also allows you to compare evaluations over time. For example, you can track a participant's progress over six months and immediately see how they have evolved.

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### Literacy

The literacy module structures your educational services and facilitates the management of registrations, attendance, and participant levels. You can organize your content by session, create workshops, and evaluate progress using grids tailored to your educational objectives. Automated waiting lists also provide a clear view of demand. For example, you can enroll a participant in several French language workshops, track their attendance, and generate a progress report for your funders.

# Intervention plan

The intervention plan allows practitioners to note the objectives agreed upon with the user. Each objective is then tracked in the intervention plan: deadlines, follow-ups, results, etc. Since intervention plans are critical tools for clinical continuity, they can be automatically opened when the user's file is opened to ensure that the intervention plan is followed. This tool also has the option of assigning a due date and a practitioner for review. This helps keep all relevant intervention plans up to date. For example, in a suicide prevention center, a practitioner who answers a call from a known user immediately sees the intervention plan displayed. They can then follow the instructions and add any new information discussed to the file.

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# Online registration

Sometimes, it is easier to let users register directly rather than having staff members do it for them after the fact. ASO offers several options depending on the complexity of your needs. At the simplest level, you can create a public form, and each copy submitted by a user appears directly in ASO, allowing staff to use it as a starting point for the next steps in the registration process, if any. It is also possible to create a portal for resource users to manage their registrations for different activities. For example, for a day camp, parents log in to the portal, choose activities for their children, and your team simply validates and completes the registration.

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# Room reservation

The room reservation module simplifies the management of your organization's spaces. You can plan the use of rooms and check availability. Room reservations can also be made automatically from a different entry. For example, you can note in a group activity file that the activity will take place in the gym. A reservation is then automatically created for the right room at the right time. It is also possible to include equipment requirements in this module.

## **Community relations**

Community relations encompasses awareness initiatives, media participation, and events in your community. The module helps you plan campaigns, coordinate your social media presence, organize booths or training sessions, and record meetings with partners. It also provides reports on activities carried out and populations reached. For example, you can record an open house where you present your services to young families and note the number of participants.

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## **Building management**

This module focuses on managing your physical facilities. It allows you to plan and track maintenance and repair work, record renovations, and organize preventive maintenance tasks. You can also manage room reservations and coordinate maintenance work with service providers. For example, if a kitchen needs to be brought up to standard, you can schedule a visit from the contractor and track the progress of the work.

# Real-time reports

Collecting information in a tailored and effective manner is only half the challenge – another key value of ASO lies in how it helps an organization learn from the data it gathers. ASO was designed not just as a record-keeping platform, but as a decision-support system. Every form, intervention, and activity tracked in ASO can feed into powerful reports that reveal patterns, measure outcomes, and support accountability.

To meet the diverse needs of non-profits, ASO divides its reporting tools into two main categories: generic reports and custom reports. Together, they allow organizations to move seamlessly from quick, self-service statistics to complex, cross-table analyses that tell the complete story of their impact.

## Generic Reports: Module-specific

Generic reports are designed for everyday analytical needs – the kind of statistical questions that program managers and directors ask regularly. Each generic report focuses on a specific module of ASO, such as accommodations, progress notes, intervention plans. Within that module, users can decide exactly what they want to measure and how they want to see it.

Every generic report includes all of the available statistical fields (essentially anything that isn't a text field) for that module, giving users two main ways to explore their data:

- **Main statistic view:** Summarize data in a single overview table. For example, a report on interventions might display the total number of interventions completed during the year, broken down by category – offering a quick, high-level snapshot of activity.
- **Grouped results view:** Produce one table for each occurrence of a selected variable. For instance, a report could show the same breakdown of interventions but separated by counselor – allowing staff to compare their individual caseloads and service types.

Each report also includes a wide range of filter options, enabling users to narrow their question to a specific population, time period, or service type. For example, a shelter could filter for interventions conducted with residents under 25, or for group sessions focused on parenting support. These filters transform what could be a static report into an interactive research tool.

To streamline recurring analyses, configured questions can be saved directly in ASO as pre-built templates. Once configured, they can be rerun at any time with a single click – ensuring consistency in annual reporting or longitudinal comparisons.

Multiple configured questions can also be grouped into a summary report, which executes each saved question sequentially and compiles the answers into one coherent document. This feature allows managers to create their own “monthly statistical brief” or “year-end performance summary” that refreshes automatically with the latest data.

## Custom Reports: Tailored Analytics

While generic reports cover most everyday needs, some analytical questions require a more nuanced view of the data especially when aggregating results across several tables. For these cases, ASO provides custom reports, which can take any form and level of complexity.

Custom reports are developed collaboratively with each organization to ensure that the structure of the analysis fits the organization’s workflow, terminology, and reporting requirements. They can include:

- Advanced cross-table linkages, such as connecting trauma-risk levels from a beneficiary’s intake file with the duration of their lodging stay and the number of interventions recorded during that period.
- Export-ready formats for funders or government reporting systems.

Where generic reports already allow some cross-table analysis (for example, filtering by client age group, gender, or city), Custom reports push that flexibility further. They are ideal when an organization needs to analyze relationships between distinct parts of the database.

Each custom report is purpose-built, ensuring that the visualizations and calculations align precisely with the organization’s goals. The result is not only accurate reporting, but also actionable insight – data presented in a way that staff and leadership can use to refine programs, allocate resources, and demonstrate impact to stakeholders.



# PROCESS

At SDP, we believe that the success of a technology project depends on close and ongoing collaboration with our clients. Deploying ASO is never a simple transfer of a solution: it is a joint effort in which we analyze your needs, understand your working methods, and adapt the platform to your operational realities. Since every organization has its own processes, our support aims to build a solution that concretely supports your daily activities. We work transparently, explaining each step and validating technical and functional choices with you so that implementation is clear and predictable. This structured method promotes efficient, secure deployment that is perfectly adapted to each organization we support.

It takes place in four stages:

1

## Planning

A detailed analysis of your needs and internal operations allows us to develop a precise work plan. This phase aims to define priorities, clarify objectives, and prepare a configuration tailored to your environment.

2

## Validation

Follow-up meetings are held with your team to confirm that the defined parameters meet your expectations. This step reduces the risk of discrepancies between the delivered solution and your needs, ensuring a controlled deployment.

3

## Training

Your employees participate in targeted sessions to learn how to use the platform. The goal is for your teams to become self-sufficient and know how to use the features as soon as the platform goes live.

4

## Support

After implementation, we remain available to respond to your requests and assist with any necessary adjustments to ensure continuous and stable use.



With ASO, you get a solution that goes far beyond simple management software. It's a tool designed to simplify your daily life, centralize your information, and support your teams in achieving their goals.

Whether you are a growing organization, a well-established team, or a large-scale group, our modules adapt to your real needs. Our mission: to offer you clear, effective, and scalable management.

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## What are the next steps?

- Request a personalized demonstration
- Contact our team to discuss your needs
- Discover how ASO can transform your organization

*ASO, your trusted partner for simple, efficient, and people-oriented management.*