

Non Profit Customer Success

Case Study: A Global Non-Profit Organization Unifies Data for Transparent Reporting with Oracle Cloud EDM

This success story illustrates how a multinational non-profit organization, facing challenges from a complex and decentralized IT infrastructure, leveraged Oracle Cloud Enterprise Data Management to centralize its data, enabling a new level of business agility and strategic insight.

Business Pain and Need

The client, a global non-profit organization with a mission to deliver humanitarian aid, was struggling with a complex and siloed IT landscape. Their operations spanned dozens of countries, each with its own way of defining key business dimensions like programs, grant accounts, and a chart of accounts. This created a major disconnect in their financial and operational data, which was a major roadblock to their mission. It was nearly impossible to accurately track and report on where donations were being spent or to model the impact of a new program. The lack of a governed data process also meant that manual, spreadsheet-based reconciliation was the norm, which was a major drain on resources and a source of constant reporting errors. They desperately needed a modern solution to unify their enterprise data.

The Solution

The company implemented Oracle Cloud EDM as a centralized master data hub. The solution was designed to:

Establish a "Single Source of Truth" for Grant and Program Data: They used EDM to create a single, governed master list of all grant accounts and programs. This ensured that all downstream systems—from the core fundraising and financial systems to the reporting applications—used the same, accurate data.

Align Financial and Operational Hierarchies: EDM was used to create and maintain a unified hierarchy for all departments, legal entities, and cost centers. This allowed the company to consistently report on where donations were being spent, no matter where the data originated.

Enable Transparent Reporting: By providing a consistent data foundation, EDM allowed the company to finally gain a unified view of its finances. This enabled leadership to make better strategic decisions about where to invest and how to optimize their programs.

Automated Data Governance Workflows: The company configured EDM to automate the process of creating new programs or organizational units, ensuring all changes were reviewed, approved, and automatically published to all subscribed applications.

Implementation Timeline

The project was completed in approximately seven months. This included the initial discovery and design phase, the configuration of EDM, the integration with their existing ERP, EPM, and fundraising systems, and the training of their business teams. The phased approach allowed the company to begin with a critical business unit and then scale the solution to others, including newly acquired entities.

ROI and Business Value

The implementation of Oracle Cloud EDM provided a clear and compelling return on investment, with a payback period of under a year. The key business values and ROI metrics included:

Faster Financial Close: The company reduced its financial close time by 40% by eliminating manual data reconciliation and validation, which had been a major bottleneck.

Improved Strategic Decision-Making: For the first time, leadership had a unified, accurate view of where donations were being spent, enabling them to make better-informed decisions about their program portfolio.

Reduced Audit Risk: The automated, auditable workflows ensured complete data integrity, which simplified the audit process and reduced compliance risk.

Increased Productivity: By empowering business users with a self-service EDM platform, the company freed up its IT team to focus on more strategic, high-value projects rather than day-to-day data management.