



Elizabeth Glaser Pediatric AIDS Foundation

BI360 Data Warehouse helps Elizabeth Glaser Pediatric Aids Foundation Achieve Real-Time Reporting on a Global Scale.

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In pursuit of a global uniform process for financial reporting and budgeting, Elizabeth Glaser Pediatric Aids Foundation decided to empower their staff and their data analytical tasks across offices with BI360 to achieve user friendly, powerful reporting processes that eliminated the involvement of IT to produce reports and budgets. The BI360 Data Warehouse enabled them to streamline their data processes.



**Elizabeth Glaser
Pediatric AIDS
Foundation**

<http://www.pedaids.org/>

Company Profile

The Elizabeth Glaser Pediatric AIDS Foundation is a nonprofit organization dedicated to preventing pediatric HIV infection and eliminating pediatric AIDS through research, advocacy, and prevention, care, and treatment programs. Founded in 1988, EGPAF supports activities in 19 countries around the world.

Industry

Not-for-Profit

Country

United States, Global Operations

ERP System

Microsoft Dynamics GP



The Elizabeth Glaser Pediatric AIDS Foundation (EGPAF) is a Washington, DC-based not-for-profit that focuses their efforts on ending the AIDS crisis, specifically for children, mothers and young people. Their mission involves research and investigation, as well as education, prevention, advocacy, and care for the global community. They are leaders in this cause, but work collaboratively through partnerships on the ground domestically and internationally. EGPAF is dedicated to continuing this ever-important work and ensure that this is the generation that ends AIDS.

EGPAF decided that they wanted a data warehouse solution, but it was important that the product be easy to use for not just IT and SQL-experienced professionals. They wanted to empower their business end users to create reports and budgets with their information. "The biggest challenges we were facing were the ability to report in 'real-time' against multiple data sources and accessing detail for all transactions. We are headquartered in DC, but have offices in Africa," EGPAF Business Systems Manager Tashma Green says.

"In those offices, they use Quickbooks. That information is summarized and then uploaded to Great Plains. When those summarized amounts were questioned, the burden of the research fell to the Accounting team. Additionally, as the complexity of the work we do becomes increases, we wanted to ensure we were giving our staff the tools they needed to have insight into the activities that were important to their scopes."

When EGPAF was shopping for a tool to streamline their information management, reporting and budgeting processes, they knew they wanted to enable their finance team to produce their own reports. "We knew we wanted a data warehouse, but we didn't want the usual allocation of work and responsibilities that would come with a standard one – reports being written and maintained by IT and then, distributed to staff," Green says. "BI360 offered a data warehouse solution that included report writing at multiple levels. While someone with an advanced IT and SQL background could create reports in BI360, the product also gave finance and accounting staff that ability with an easy-to-use

interface. We now have a team of report writers that share the responsibility and workload of report creation. This has eased the burden placed on IT and empowered both the accounting and finance teams.”

The Solver solution, called BI360, is based on Microsoft SQL Server, Microsoft Excel and a self-service Web Portal. Solver is headquartered in Los Angeles, CA and operates internationally, with a total of 115 employees.

“Our solution partner, Broadpoint Technologies, was incredibly patient and brought a wealth of knowledge from their other clients who’d gone through the same process,” Green says. “It was painful at times, with some work still ahead of us, but our data is in much better shape than when we began. When we did reach out to Solver, they were responsive, professional and knowledgeable.”

Nils Rasmussen, Solver’s Principal, says: “We are seeing a rapidly increasing number of not-for-profit organizations as well as companies realizing that a centralized data warehouse to combine their different data sources, Excel-based report design and web-based access for reporting and budgeting users is the answer to the goal of self-service business intelligence. We are excited to see that organizations like Pediatric Aids Foundation are taking advantage of BI360 to help automate their processes to better achieve their mission.”

EGPAF currently has several modules integrated into the BI360 Data Warehouse, but plans to expand their input for richer reporting and budgeting. “We’ve integrated financial (GP and QB), contract, procurement and payroll data (time and salary) into BI360. We have twelve modules currently,” Green says. “There are a number of small query reports that staff uses daily to research account balances or activity, but the most high profile reports allow budget and award managers to track how well they’re utilizing the funds under their scope.”

In addition to implementing the BI360 Data Warehouse, EGPAF also utilizes the BI360 Planning module for budgeting and forecasting models. “The full adoption of the Planning module was slow. Creating a system from scratch exposed a number of issues with our legacy process, and it took some time for us to work through everything,” Green says. “We’re still fine tuning, but we do produce corporate budgets, which is a calendar year budget for our Foundation as a whole in BI360. We have scenarios that capture the initial board approved budget, a mid-year adjustment, and forecasts.”

They also use BI360 for “Award budgets, which are budgets that can cover multiple years and countries for the Foundation’s programmatic work,” Green says. “Scenarios capture incoming award budgets, total value of all years in an award budget (life of project), individual tranches (obligations for CDC, USAID), and award projections. Overspending a budget or award is a big concern, but so is underspending. The ability to quickly assess the status of an award/budget is essential to our continued success. We want our staff thinking strategically and tactically, and these reports help to spur that deliberation.”



Photo Credit: EGPAF

“Instead of relying on finance or accounting staff for the latest report, users can log into BI360 and run the reports they need in a matter of seconds. We believe this change will sanction staff to take control of data under their purview and lead to timely, accurate, and informed decisions being made. As our use of BI360 matures, we hope our culture becomes anticipatory in regard to our programmatic operations.”

Looking ahead, what are the future plans for further development of their processes using BI360? “There are a few other sources of data we’d like to integrate into BI360, so we can present a more complete look at our operations,” Green says. “There’s also been interest in incorporating Power BI, so that is something we’ll be exploring in the coming months as well.”

Challenges

Wanting to streamline and upgrade their financial reporting and budgeting processes across their global offices, The Elizabeth Glaser Pediatric AIDS Foundation knew they needed a data warehouse that not only consolidated multiple data sources and different modules for general ledger and sub-ledger reporting, but also did so in a way that allowed business end users to access and run their own analyses. More specifically, this not-for-profit leader wanted a self-service Business Intelligence solution that met their specific and global needs to produce meaningful reports and budgets for valuable insight into the health of their organization.

Result

BI360 has not only provided a singular, unified space for the diverse data types that populate the reports and budgets that The Elizabeth Glaser Pediatric AIDS Foundation relies on to make informed organizational decisions, but the solution has also improved reporting and budgeting processes for business end users across all offices around the globe. The organization plans to continue adding more modules for diversified data to the BI360 Data Warehouse in order to accomplish their robust analytical objectives to continue to lead in their mission to research, educate, treat and prevent AIDS for the global community.



Resources

[BI360 Data Warehouse Product Page](#)

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