

DATA GOVERNANCE 2021

EXECUTIVE BRIEF SERIES

THE 3^RD IN A 4-PART SERIES



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DATA GOVERNANCE

Data governance (DG) is the process of managing the availability, usability, integrity and security of enterprise data, based on internal data standards and policies. The reason to conduct a DG initiative is to mobilize your data and leverage it as an asset for the benefit of the organization.

At a high level, data governance implies adherence to data policies, but at a finer level it means ensuring data utility – that data assets are accurate, consistent, and complete; that access to shared assets is transparent, and data consumers are provided with the information they need for data selection and use.

Two important elements of DG are data stewards (the named individual(s) responsible for managing a given data set) and data definitions (technical and common-language explanations of what the data means and its purpose). In the case of membership organizations, the membership director may be the data steward of the membership data, manage access to the data, and work to establish the definitions and rules for key terms such as member, affiliate, and grace period.



What Benefits should Data Governance Provide My Organization?

Many organizations embark on a DG initiative because they want to extract more utility from their data but then find that their data has issues, the staff don't trust it, it is not reliable, or timely access to the data for decision making purposes is restricted. While most organizations are home to a variety of data assets, many of these assets are effectively hidden when there is no organizational inventory.

A DG initiative should provide the following benefits to your organization that alleviate those issues:

- Alignment between your strategic plan and the management of data assets needed to support it
- A data-savvy team that values and cultivates data as an organizational asset
- Agreed-upon terms and definitions that allow all staff members to consistently evaluate and understand the data
- Identified roles, responsibilities, and authority to manage, deploy, and protect the data

At the conclusion of a DG initiative, you will have policies to effectively maintain your data and will be ready to use it to help you more effectively run your organization.

Agile Data Governance Wins Over Everyone

Agile Data Governance (ADG) takes an organization-wide approach by involving data stewards and consumers of data in all phases -- crafting and prioritizing user stories, designing and implementing changes, and creating and delivering on change management plans. ADG strives for quick wins while socializing the DG concepts to those who may be reluctant to commit fully. By delivering incremental value in a short turnaround time, ADG efforts generate momentum and reinforce buy-in across the organization.

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In many organizations, the late adopters to DG tend to be individuals who were burned by poor DG in the past. ADG works to win them over to the new agile working methodology that will benefit them greatly. The long-time employee who keeps a spreadsheet in their top drawer – not because they want to - but because lax DG made it possible for someone to wreck their data / report / query etc. in the past, will need to be convinced to abandon their data silos. Effective ADG with continuous and incremental value wins over even the most strident critic to the process over time.



WHAT ARE THE ELEMENTS OF DATA GOVERNANCE?

DATA GOVERNANCE CHARTER & TEAM

To kick off an ADG initiative, a DG Team is established, ideally with representation from all the key departments. This team creates a DG charter authorizing the formation and work of the data governance team, outlining objectives, defining roles and responsibilities, identifying stakeholders, and infusing the project manager and team with authority.

It is most effective if the DG Team has board or executive sponsorship with express authority to act and effect positive change.

DATA GOVERNANCE POLICY

The DG team develops a comprehensive Data Governance Policy – ideally using the ADG methodology. Generally, this includes defining the roles and responsibilities for different data usage and data collection, developing best practices for effective data management, developing policies to protect data against internal and external threats, and ensuring that an organization complies with applicable laws and regulations related to data usage.

It is not unusual for the IT Department to focus on the task of data security (protecting data against internal and external threats), while the rest of the DG team focuses on defining the roles and responsibilities for different data usage and developing best practices for effective data management.

STRATEGIC PLAN REVIEW

The DG team reviews organizational-wide strategic and operational plans. These documents often include priorities, business development, communications, diversity, and other topics. The DG team formulates data strategies and procedures to support the strategic plan and better understand its members and customers through the use of data. The DG will need to regularly return to the strategic plan as the team learns more about the data and its usage, how the plan could be better supported, and to align to changes as the strategic plan evolves.

ASSET REVIEW & DATA MAP

The DG Team identifies all the salient enterprise data assets that are in use in the organization and classifies their function and value to the organization. This should include identifying all the individual spreadsheets and contact lists that staff maintain separately to do their jobs – with a goal of bringing these resources under management in order to leverage data value, maintain fidelity, and improve security. Larger organizations may have the tools to automatically crawl the enterprise - identifying and cataloging the organizational data assets - and then conducting a scan of the contents of each data asset to determine whether it is structured, semi-structured, or unstructured, infer the data asset's metadata, and even categorize the data asset in terms of the sensitivity of the embedded content.

In addition to documenting the assets, the DG team will create a data source map that illustrates the intersections between the systems to account for changes that happen in one which affect the other. This step will help eliminate future negative impacts to downstream systems and data consumers. For example, an Association Management System (AMS) is likely the system of record for an individual's member type and member status. Event registration systems consume this information in order to offer the correct event pricing to a logged-in registrant, while an advocacy system consumes this information to report the member count in a congressional district. If a new member type is added, or the grace period is changed, data stewards now have the mapping needed to communicate changes to data consumers early in the planning process to prevent negative impacts to these systems. If errors do occur, this data source map enables the data consumer to identify the root cause by traversing the data lineage back to where the error was introduced.



CRITICAL MOMENTUM & STAFF ASSIGNMENTS

As mentioned above, the virtuous cycle activated by the ADG methodology produces consistent and incremental improvements for the organization. To energize this cycle, the DG team will identify, prioritize, assign projects to individuals, and develop timelines for the work group. For example, an individual should be named to document the impacts that each work group assignment has across the organization's data ecosystem. Another important assignment is drafting and communicating the plans and any technology/data change to the board, executives, and the staff.

DELIVERABLES

Some common deliverables from conducting an ADG process are as follows:

- Data Asset Dictionary - the Data Asset Dictionary is an inventory of all source systems, the systems that consume or share their data, their stewards, and key constituents involved with each system. This identifies systems of record, organizes and maps integrations, and tracks user and data steward accountability to ensure that any downstream impacts are considered in planning future changes.
- Common Language Glossary - the Common Language Glossary is an official lexicon of commonly used organizational terminology. It defines terms, key performance indicators and other metrics, business rules, and other components of an organization's vocabulary.
- Data Technical Definitions - Data Technical Definitions are a set of rules used to query data, track KPIs, and prepare reports. This cross-system reference will help an organization maintain a single source of truth for each metric.



CONCLUSION

Many organizations want to jump into data analytics, start measuring their activity, and begin to make better informed decisions – a worthy pursuit indeed. But without trusted data and staff commitment, the effort will not achieve the desired outcomes. A Data Governance initiative establishes policies and procedures, which in turn build a foundation of effective data management and usage to support operative and transformative data analytics.

Checklist for an Effective Data Governance Initiative

- Implement an Agile Data Governance methodology to drive consistent and incremental improvements for the organization.
- Create a Data Governance team fueled with authority and organizational-wide representation.
- Create a Data Governance charter and policy to establish objections, roles and responsibilities, and data stewardship.
- Prioritize momentum and incremental advancements.