

Data Assessment → Gold Schema Blueprint

A Practical Guide to Converting Raw Data into Trusted Insights

Purpose of This Blueprint

Most reporting issues don't start in dashboards—they start in **unclear definitions, inconsistent data, and weak foundations**.

This blueprint provides a **step-by-step approach** to:

- Assess your current data landscape
- Identify trust-breaking issues
- Design a **Gold-ready data schema** that supports accurate reporting, dashboards, and decision-making

This is especially relevant for **associations** working with multiple systems such as AMS, events, LMS, finance, and marketing platforms.

What You'll Get From This Blueprint

By the end of this guide, you will be able to:

- Identify where your data quality breaks down
 - Align definitions across systems
 - Design a Gold schema that leadership can trust
 - Prepare your data for dashboards, portals, and analytics tools
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Step 1: Inventory Your Data Sources

Goal

Create visibility into **where your data lives** and what each system claims to represent.

What to Do

List all systems that produce reporting data, such as:

- AMS / CRM
- Event management

- LMS
- Finance / billing
- Email or marketing tools
- Chapter or portal systems

For each system, document:

- Primary entities (members, registrants, transactions, chapters)
- Key metrics it reports
- Update frequency
- System owner

Output

A clear system-to-metric map showing overlaps and conflicts.

Step 2: Identify Metric Conflicts & Definition Gaps

Goal

Surface why stakeholders see **different numbers for the same question**.

What to Check

Focus on high-impact metrics such as:

- Active members
- Paid members
- Event attendance
- Revenue
- Chapter performance

Ask:

- How does each system define this metric?
- What filters or rules are applied?
- Are timeframes consistent?

Common Red Flags

- “Active” means logged in (system A) but paid dues (system B)
- Revenue includes refunds in one system but not another
- Members counted by record vs. household vs. organization

Output

A list of **conflicting definitions** that must be resolved before reporting.

Step 3: Bronze Layer – Ingest Everything As-Is

Goal

Preserve raw data without assumptions.

Best Practices

- Ingest data from all systems **without transformation**
- Retain original field names and values
- Timestamp all ingested records
- Avoid early filtering or “cleanup”

Why This Matters

- Prevents data loss
- Enables traceability
- Supports audits and backtracking

Output

A complete raw data layer representing the source systems exactly as they are.

Step 4: Silver Layer – Standardize & Clean

Goal

Create consistent, usable data while maintaining lineage.

Key Actions

- Normalize field names (e.g., member_id, event_id)
- Standardize formats (dates, currencies, IDs)
- Deduplicate records
- Resolve obvious inconsistencies
- Align reference data (chapters, statuses, categories)

Best Practice

Keep transformation logic **explicit and documented**—no hidden rules.

Output

Clean, standardized data ready for modeling.

Step 5: Gold Layer – Design for Reporting & Insight

Goal

Create a **business-ready schema** that dashboards and portals can trust.

Gold Schema Characteristics

- Business-aligned entities (Members, Events, Revenue, Engagement)
- Clearly defined dimensions and measures
- Time-aware logic (active as of date, rolling periods)
- Chapter and organizational rollups
- One authoritative definition per KPI

Key Questions to Answer

- What does leadership want to measure?
- How should metrics behave over time?
- What comparisons need to be possible?

Output

A Gold schema optimized for:

- Power BI / Tableau / Looker

- Executive dashboards
 - Chapter portals
 - Board reporting
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Step 6: Validate Trust Before Visualizing

Goal

Ensure the data layer is trusted **before dashboards are built**.

Validation Checks

- Reconcile Gold metrics with source systems
- Review definitions with stakeholders
- Test edge cases (refunds, lapses, reactivations)
- Confirm numbers stay consistent across tools

Trust Test

Ask stakeholders:

“If this number appears in a board meeting, would you defend it?”

If the answer is no, revisit the schema.

Step 7: Assign Ownership & Governance

Goal

Prevent the same data issues from reappearing.

Recommended Actions

- Assign a business owner per key metric
- Document definitions and logic
- Version control transformation rules
- Schedule recurring data quality checks

Output

A sustainable, trusted data foundation.

Final Takeaway

Dashboards don't create trust.

Clear definitions + disciplined data engineering do.

By fixing the data foundation first, reporting tools finally become what they were meant to be—**decision enablers, not debate starters.**

About Elastik Teams

This blueprint reflects real-world patterns we've used to help associations rebuild trust in their data—often in weeks, not months.