

Data Assessment → Gold Schema Blueprint

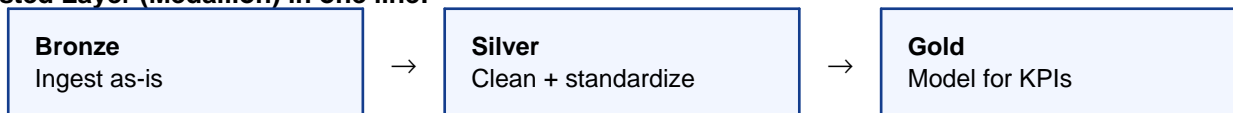
A short, practical blueprint for associations to escape the Data Trap and build trustworthy reporting.

- Built for association data pulled from AMS + events + LMS + email + finance.
- Goal: convert raw, inconsistent data into board-ready reporting using a Trusted Layer (Bronze → Silver → Gold).
- Use this blueprint for a quick assessment, a clean ingestion plan, and a practical 6-week delivery sequence.

1) The Data Trap (and the fix)

- **Symptom:** the same question gets different answers across systems (member count, registrants, revenue).
- **Impact:** low trust → manual Excel reconciliation → slower decisions.
- **Fix:** agree definitions + validate data + centralize logic in a single Trusted Layer used by every report/portal.

Trusted Layer (Medallion) in one line:



2) 60-minute assessment checklist (score 0-2)

Tip: If you score mostly 0-1 in any area, fix that before rebuilding dashboards.

Area	What to check	Score (0-2)
Definitions	Do key terms have one agreed definition? (e.g., Active Member, Renewal, Chapter Member)	0 1 2
Completeness	Are required fields consistently populated? (email, member status, join/renew dates)	0 1 2
Duplicates	Do you have duplicate person/org records across systems?	0 1 2
Timeliness	How fresh is the data used in reporting? (hours/days/weeks)	0 1 2
Reconciliation	Can you reconcile key totals across systems without manual work?	0 1 2
Ownership	Is there a named owner per critical metric (definition + validation)?	0 1 2

3) Data inventory worksheet (fill this first)

List every system that contributes to reporting and who owns it. This prevents "mystery numbers" later.

System	Domain	Owner	Extract method	Cadence
AMS	Members, chapters, dues	IT / Ops	API / DB / Export	Daily/Weekly
Events	Registrations, attendance	Events Team	API / Export	Per event / Daily
LMS	Courses, credits, completions	Education Team	API / Export	Daily/Weekly

Email	Engagement (opens/clicks)	Marketing	API / Export	Daily/Weekly
Finance	Invoices, payments, revenue	Finance	Export / DB	Daily/Weekly

4) Data quality rules starter pack

Rule type	Example (association reporting)
Uniqueness	1 person = 1 member record (dedupe on email + name + DOB if available)
Completeness	Member status, join date, and paid-through date must be present for active members
Validity	Chapter code must match the approved chapter list; dates cannot be in the future
Consistency	Active member definition matches across AMS and finance paid-through logic
Timeliness	Reporting data is refreshed at least daily for leadership dashboards

5) 6-week delivery sequence (proven pattern)

This sequence mirrors how many associations get to trustworthy reporting fast without over-engineering.

Week	Outcome	What you do
1	Assess + align	Run the checklist; confirm definitions; pick 3 priority metrics
2	Inventory + access	Confirm source systems, owners, and extraction methods; set refresh cadence
3	Bronze layer live	Ingest raw data; set basic monitoring; preserve source history
4	Silver layer live	Clean/dedupe; standardize IDs and chapters; implement core data quality rules
5	Gold model	Create reporting-ready tables/views for priority metrics; validate totals with stakeholders
6	Deliver + operationalize	Publish dashboards/portal views; document definitions; handoff runbook + owners

Need a fast starting point? Reach out to utilize our **Data Quality Analyzer** tool that identified issues and provides recommendations. Priced at just **\$1 per 1,000 records**.

Next step: run the assessment → inventory sources → build Bronze/Silver/Gold for 3 priority metrics → validate with stakeholders.