November 17, 2022 (DRAFT)

1. Welcome
2. Introduction to Data Strategy
   - Why have a data strategy?
   - What's in scope of a data strategy?
   - How do data governance and data strategy relate?
   - Example: New York University
   - Getting started - Setting strategy up for success
   - Examples from the community
3. Upcoming meetings

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Guests

Developing & Executing Data Strategy Community Group

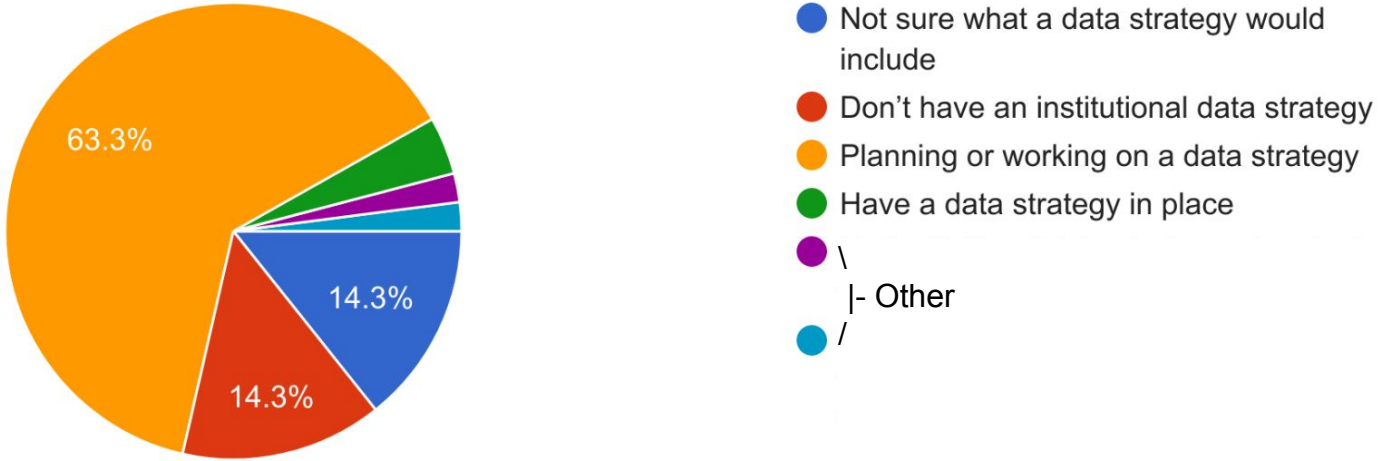
Kaitlin Wilcox, Director of Data Insights (Grinnell College)

Satya Kunta, Senior Director, Enterprise Data Management (New York University)

Poll results: Status

What's the state of data strategy at your institution?

49 responses



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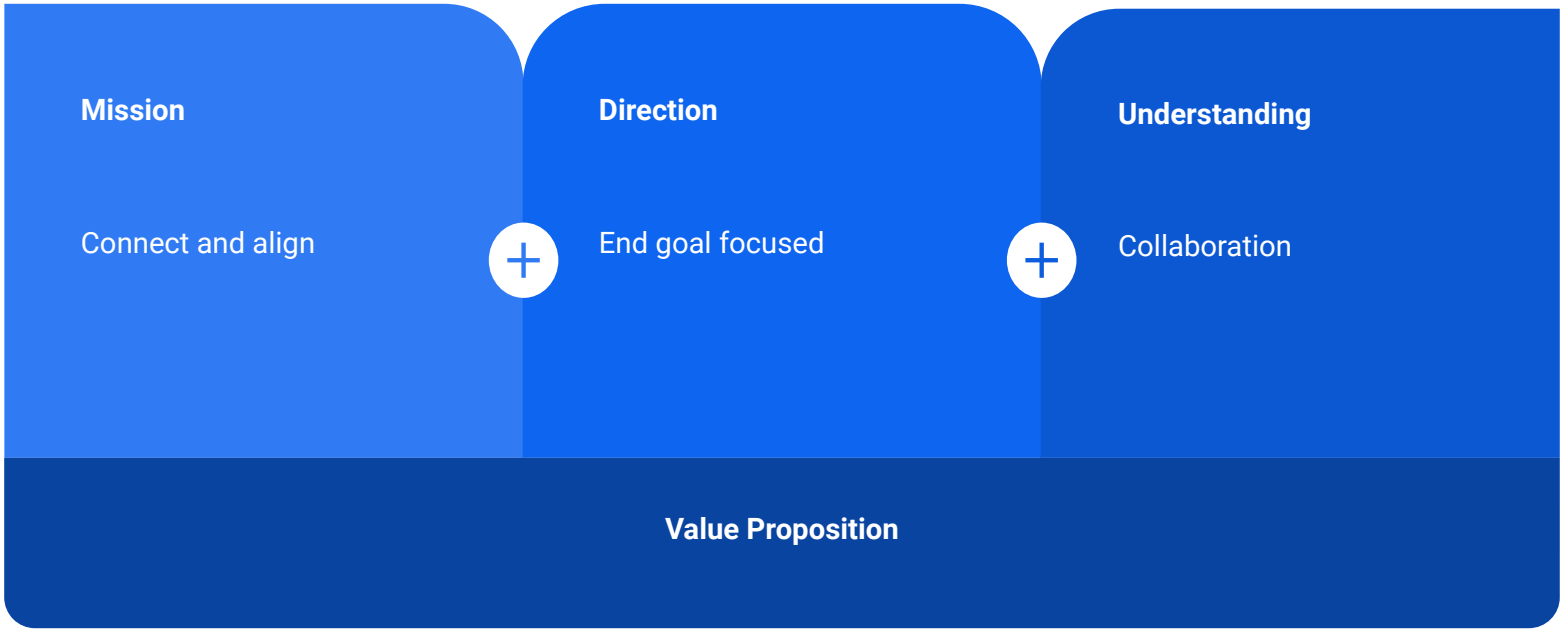
What and why?


Mission
Connect and align
Direction
End goal focused
Understanding
Collaboration
Value Proposition

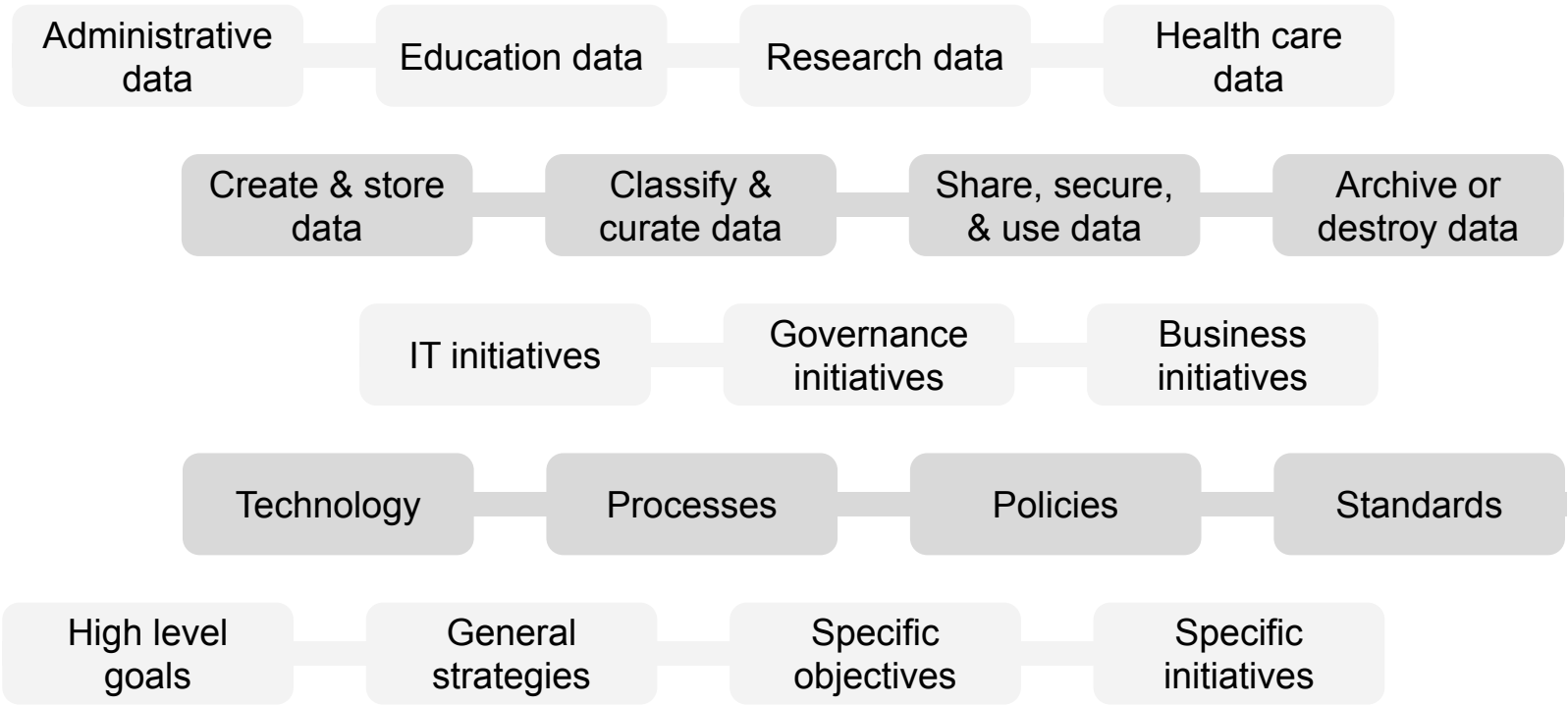
Example: Setting overall direction for data management

	DEFENSE	OFFENSE
KEY OBJECTIVES	Ensure data security, privacy, integrity, quality, regulatory compliance, and governance	Improve competitive position and profitability
CORE ACTIVITIES	Optimize data extraction, standardization, storage, and access	Optimize data analytics, modeling, visualization, transformation, and enrichment
DATA-MANAGEMENT ORIENTATION	Control	Flexibility
ENABLING ARCHITECTURE	SSOT (Single source of truth)	MVOTs (Multiple versions of the truth)

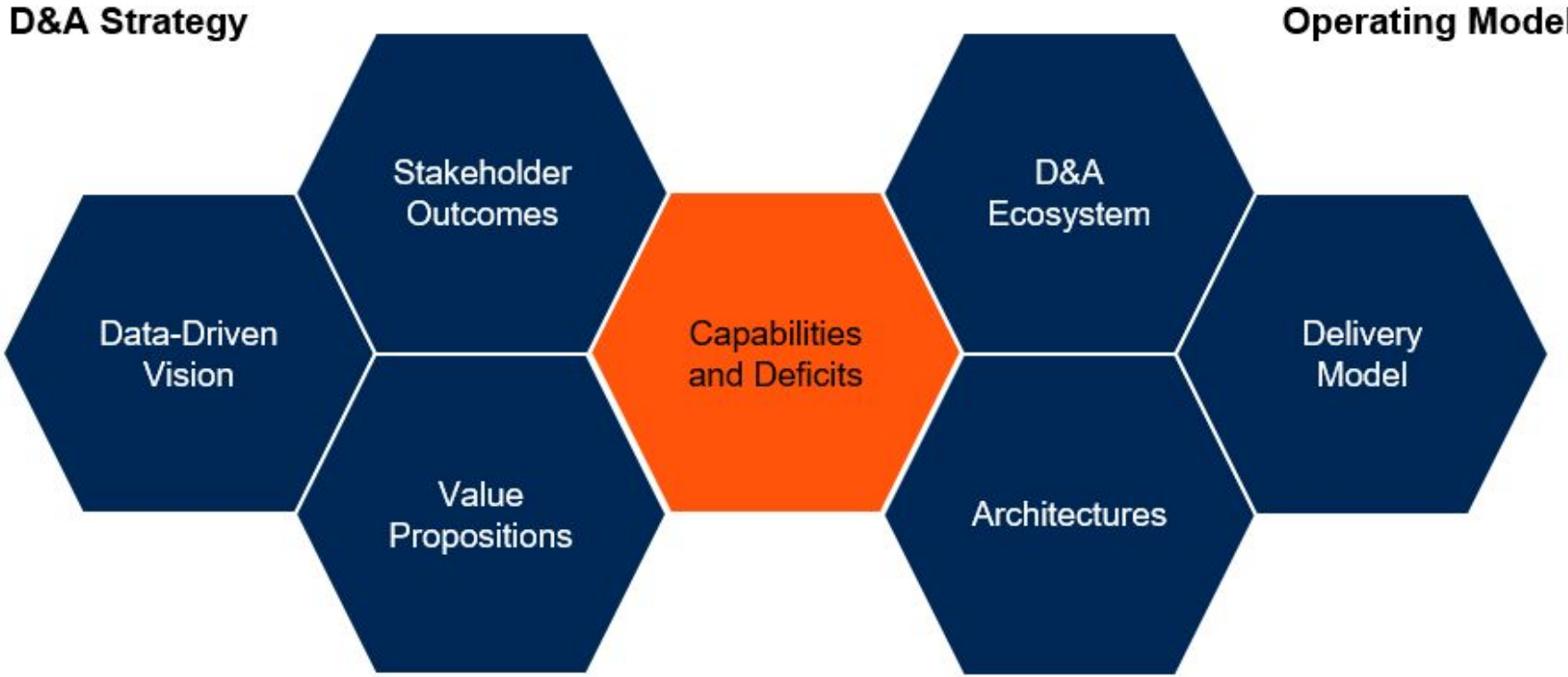
From "WHAT'S YOUR DATA STRATEGY?" BY LEANDRO DALLEMULE AND THOMAS H. DAVENPORT, MAY–JUNE 2017

What's in scope of a data strategy?

Scope can vary greatly by institution; some dimensions to consider:



Example: A data & analytics strategy framework (Gartner)



Source: Gartner - Article link ID: 378458

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Example: Scope of data management (DAMA DMBoK)

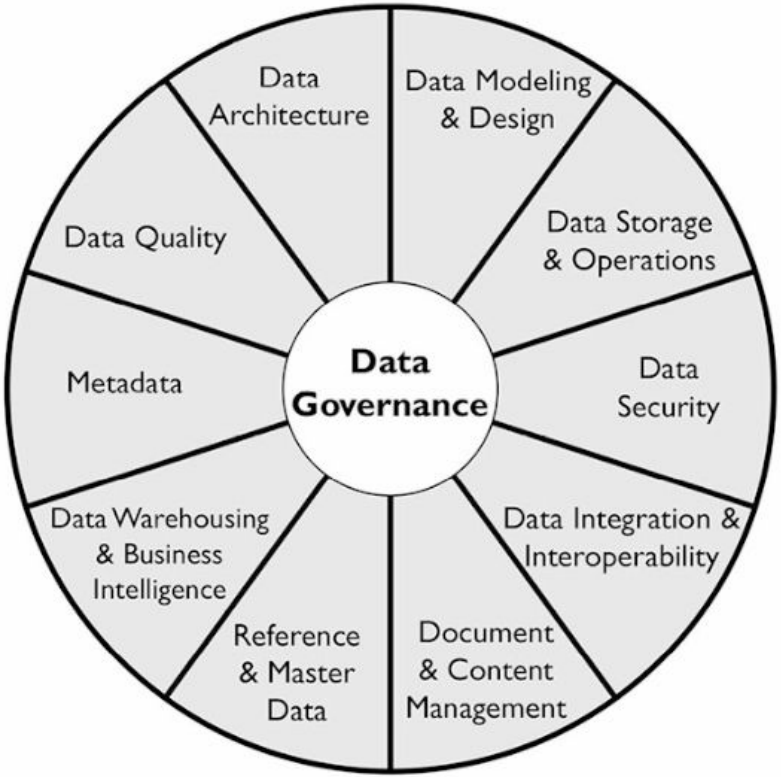
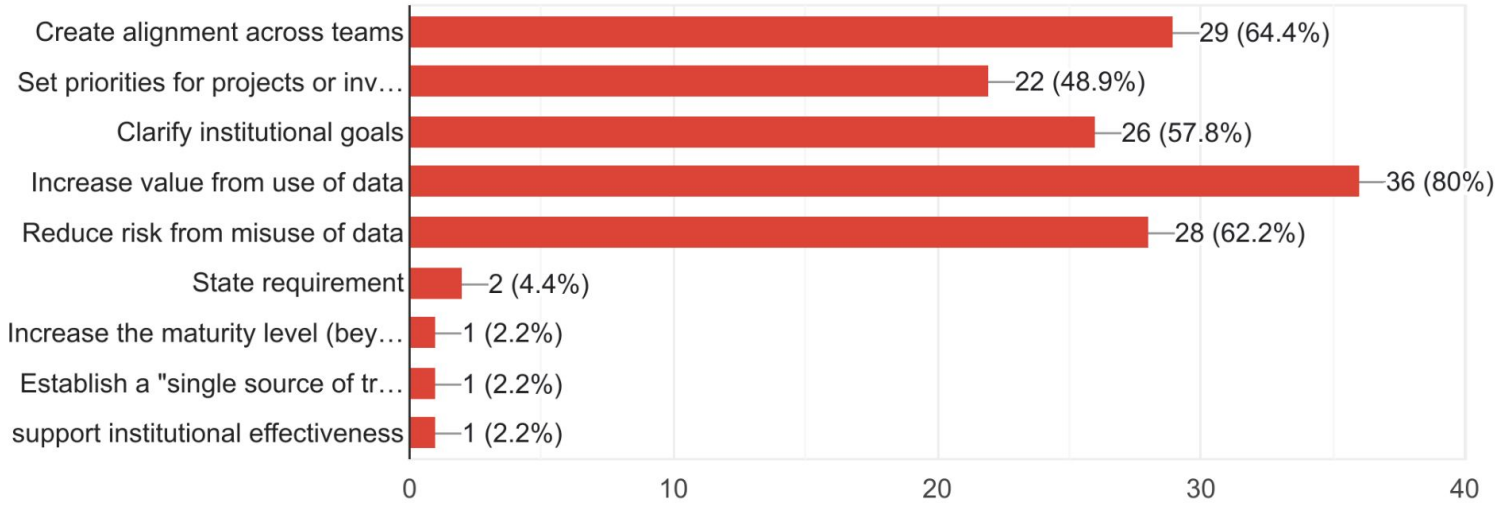


Image source: DAMA Data Management Body of Knowledge (2nd edition)

Poll results: Drivers

If you have or are planning a data strategy, what are top drivers for establishing it? (Please check all that apply.)

45 responses



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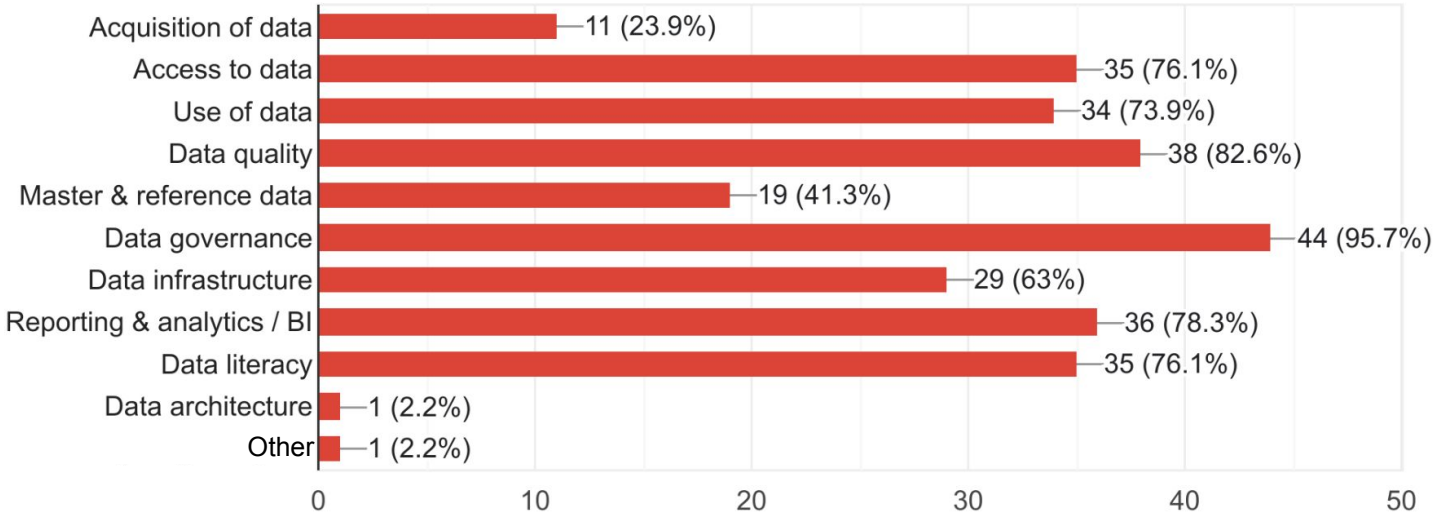
Poll results: Scope

If you have or are planning a data strategy, What topics are in scope? (Please check all that apply.)

46 responses



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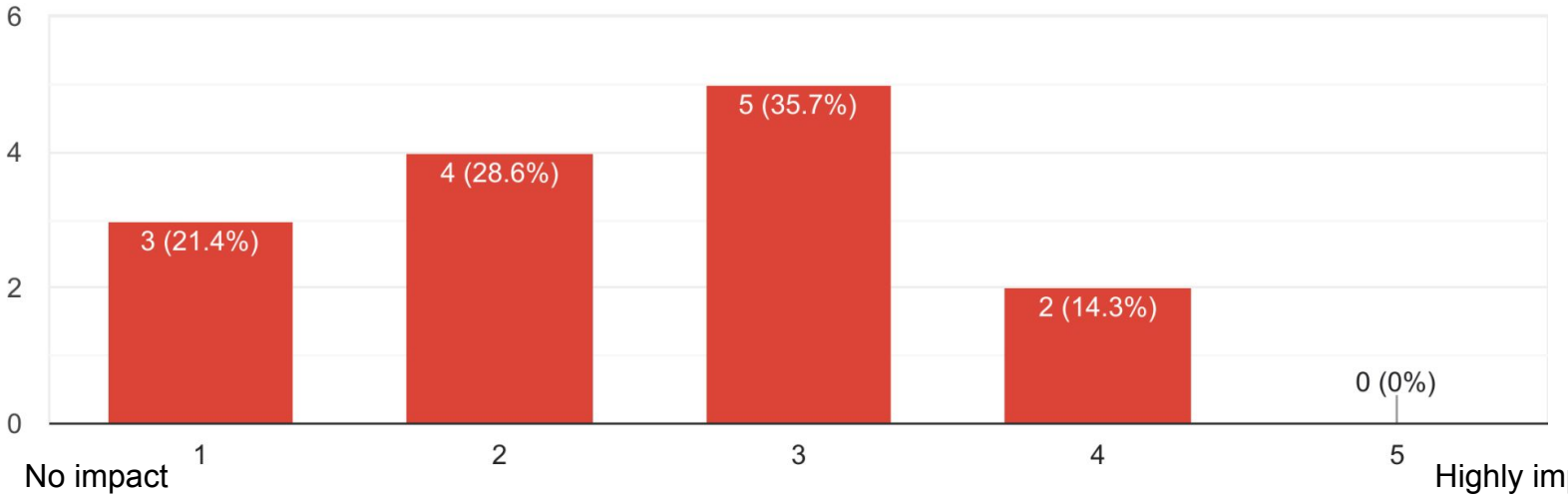
Poll results: Impact

If you have a data strategy, how would you rate its effectiveness?

14 responses



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Getting started - Setting strategy up for success

Commonly cited success factors for strategy include:

Analyze the right scope of strategy

- Assess opportunities and threats
- Analyze gaps between needs and capabilities
- Balance the need for planning/control vs. innovation/agility

Establish a broad base of support

- Enable many stakeholders to participate in the vision
- Obtain senior leadership support and alignment
- Listen to input and focus strategy on areas of real commitment

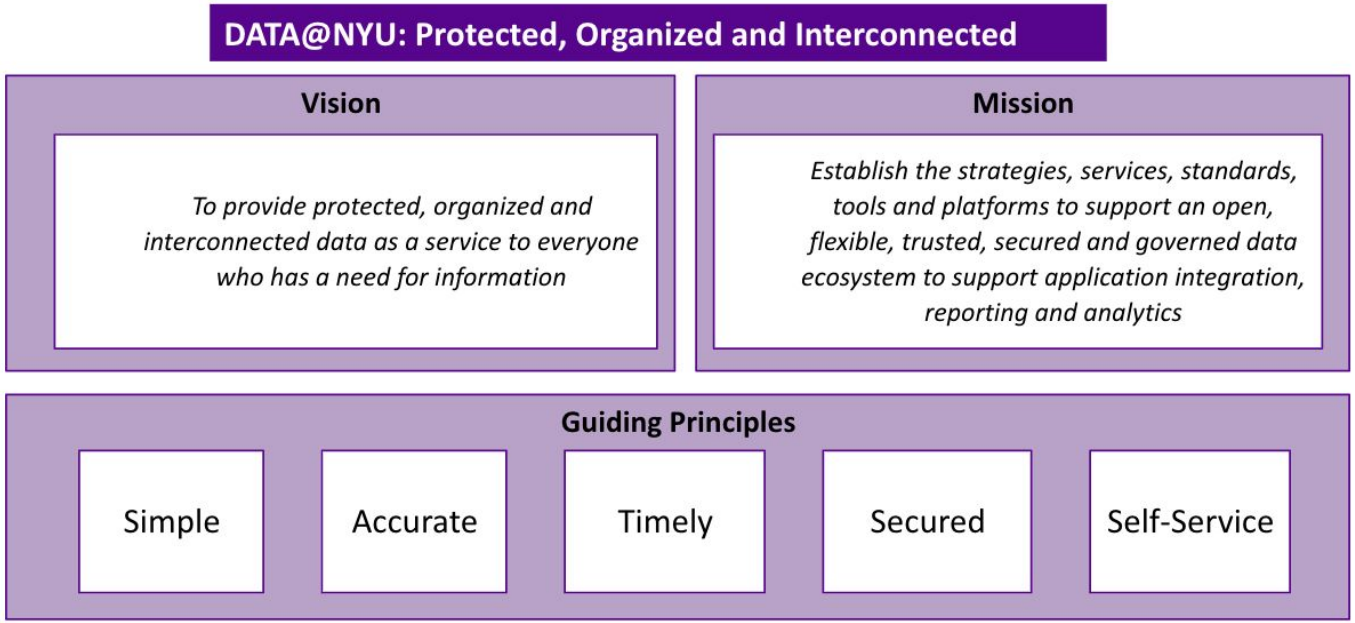
Build execution into the strategy initiative

- Set and track measurable goals
- Apply strategy at all levels
- Empower people to deliver on the strategy
- Celebrate success
- Maintain and evolve strategy

Satya Kunta, NYU: Vision, Mission & Guiding Principles

NYU Information Technology

Vision, Mission and Guiding Principles



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Satya Kunta, NYU: Data Strategy Alignment to Business Goals

NYU Information Technology

Improve NYU's data (right data, right time & right people)

Improve processes for productively & efficiently making data available

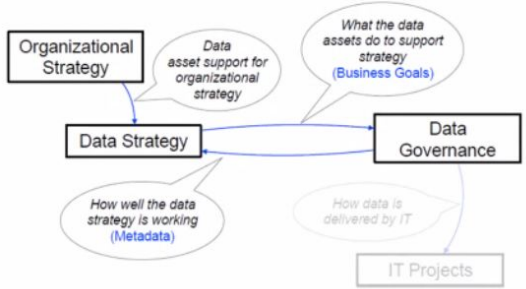
Improve the way NYU community use data to support NYU organizational strategies

Data Literacy: Improve data training for the knowledge workers

Standard Data: Continuously grow strategic IT investments (e.g., API portal, AIDA Data Hubs, UDW+ Modernization, Shared Reporting Portals etc.) to establish and disseminate standard data sets to knowledge workers.

Data Security/controls: Develop and improve processes for requesting access to data with approval workflows and controlled access policies using data security guiding principles.

Data Supply: Reduce the time and cost required to ingest, process and disburse data from variety of data sources for business needs.



- Improve NYU's ability to create, preserve, and disseminate knowledge
- Improve trust in data management decisions and data quality
- Reduce risk through regulatory, policy and procedural compliance
- Provide visibility of "What" and "Where" the data is located
- Provide "How" the data can be requested and used
- Provide what systems are using the data and for what purposes

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Satya Kunta, NYU: Data Management Strategic Priorities

NYU Information Technology

EDM Strategic Priorities

BI/Analytics

- BI licensing strategy across toolsets(OBIEE, Tableau, Brio)
- BI data management/data services modernization (OAC/Saas)
- Develop Data Science strategy/support (R, Python, Spark)

Data Warehouse

- Modernize UDW+ & migration to Cloud DW (Snowflake)
- Create Data Marketplace for Data Shopping experience
- Create Metadata repository with Governance process

API Platform

- Create an open, accessible API platform
- Introduce new and improved reusable APIs
- Introduce advanced capabilities (JWT, GraphQL APIs)

Data Governance

- Align with “Business Capabilities Model” for DG functions
- Continue to maintain knowledge and asset repository
- Foster “Community of Practice” for consumers and authors

Data Operations

- Cost and performance optimization strategies
- Re-architect and consolidate UDW and Census
- Build and implement low cost global operating model

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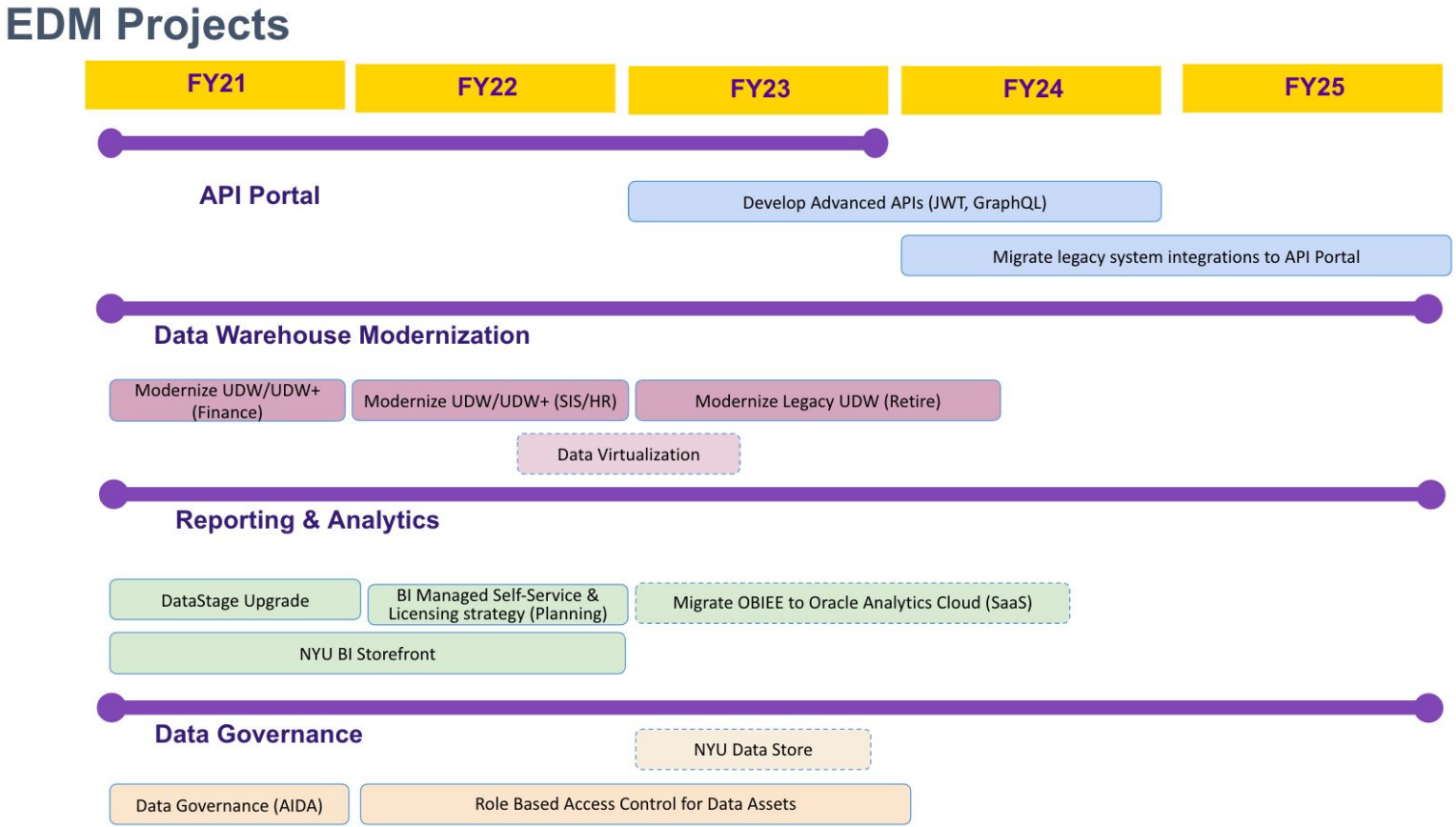
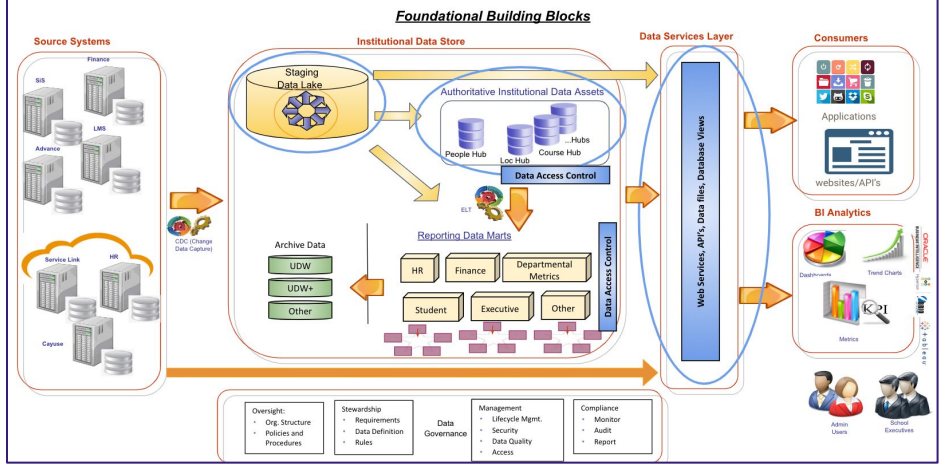
Satya Kunta, NYU: 3-5 year Roadmaps & planning



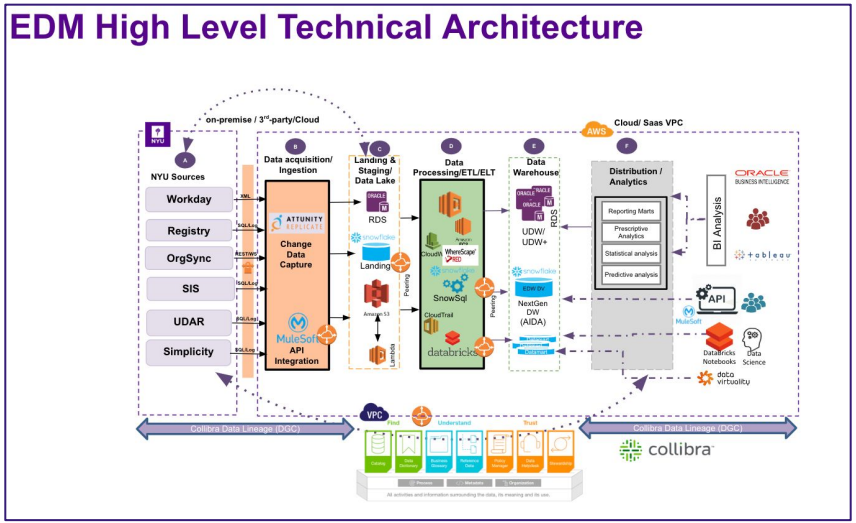
Satya Kunta, NYU: Conceptual & Technical Architecture

NYU Information Technology

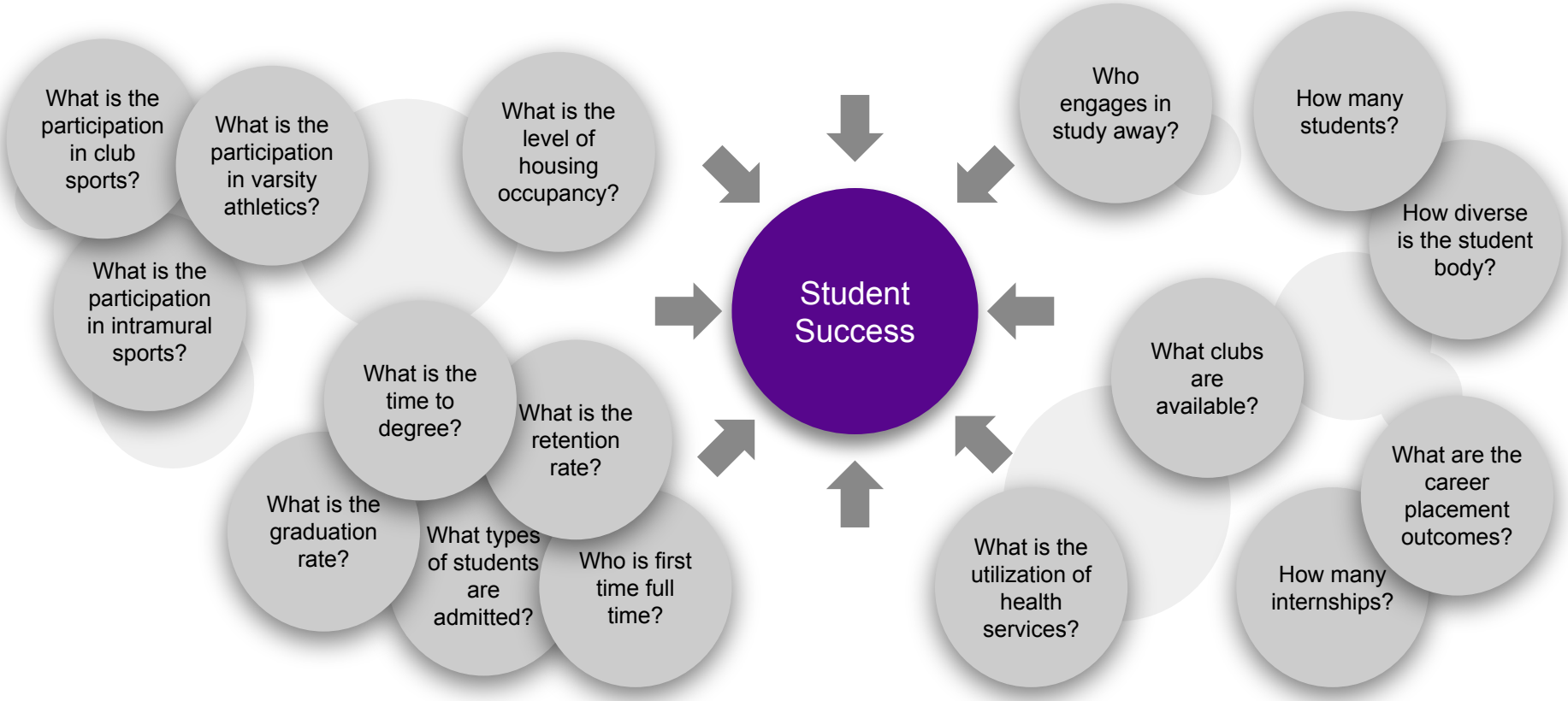
EDM Conceptual Architecture



EDM High Level Technical Architecture



Example: Enabling specific institutional outcomes



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Poll results: Could you share a link?

- Pepperdine University BI Strategy
- Southern Methodist University
- University of Auckland Data Strategy

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Lisa Welch, Pepperdine: Business Intelligence Strategy

Pepperdine University Overview

- Private, not-for-profit, religiously-affiliated DRU institution
- Stats*
  - ~10,000 students
  - ~1,100 staff*
  - ~1,000 instructional faculty

*based on Fall 2021 census

Data Architecture and Tools

- **Master Data Warehouse**: Blackboard Analytics (MS SQL Server Stack)
- **Data Visualization**: MS Power BI, SSRS
- **Data Dictionary:** iData's Data Cookbook

Lisa Welch, Pepperdine: Business Intelligence Strategy

LW

Lisa Welch, Pepperdine: Business Intelligence Strategy

LW

Curt Herridge, Southern Methodist University

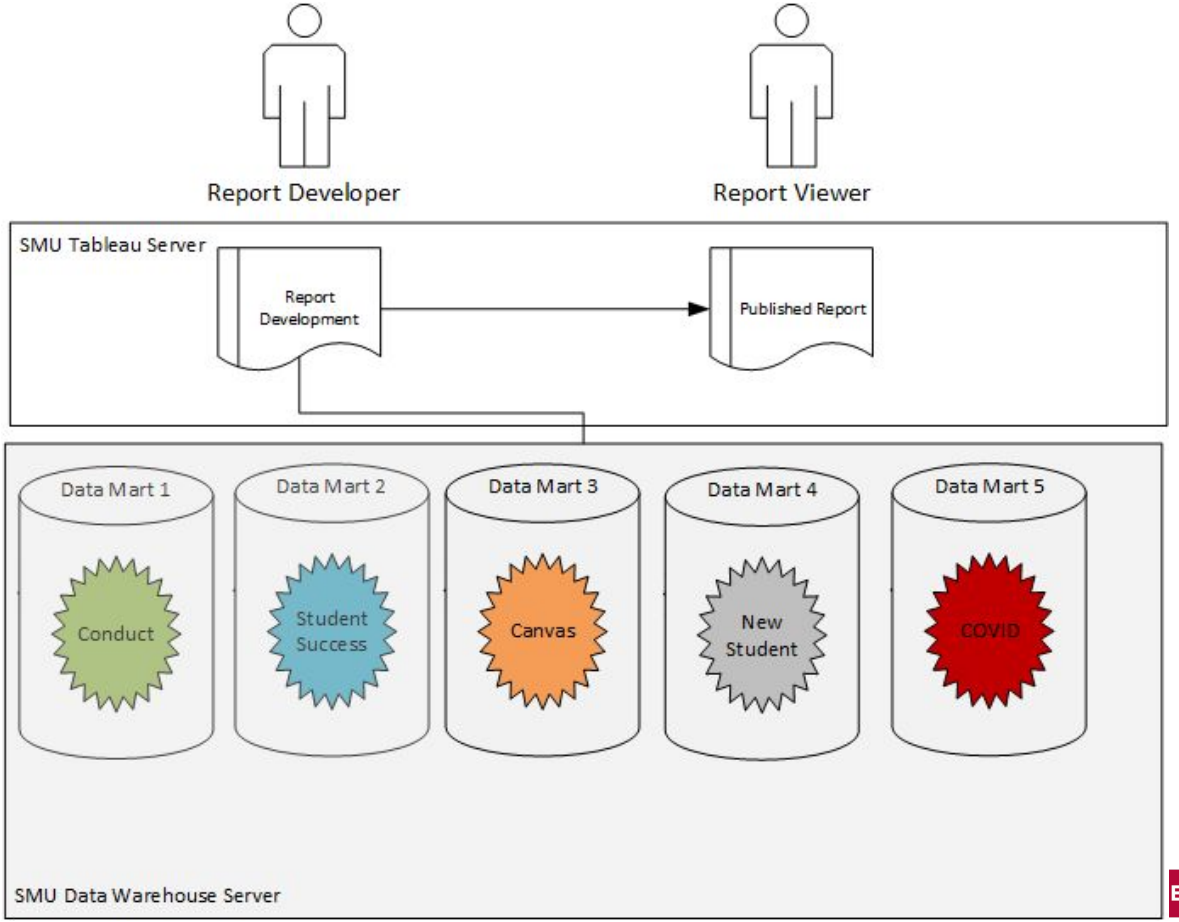
Data Governance at SMU - an evolution

1. Data Warehouse and Analytics Council
    a. Provost Office - University Decision Support
    b. Office of Information Technology
2. Data Governance Steering Committee - Associate VP's
3. Data Stewardship Subcommittee

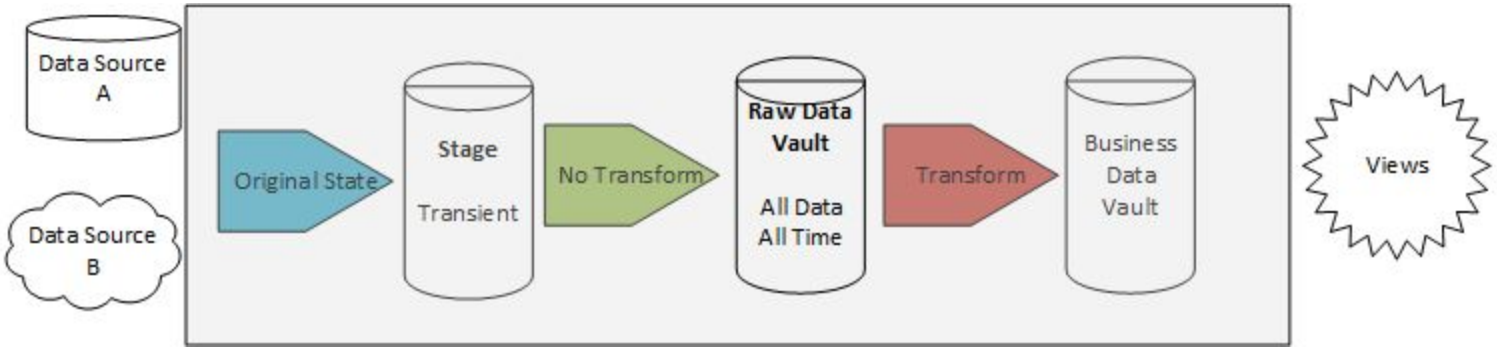
Currently undergoing charter reviews

SMU

Data Mart Architecture



Data Vault Strategy



Open forum: Examples from the community

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Appendix

Example: Braden Hosch, *Key Elements of a Data Strategy*

Data Acquisition	Data Governance
How the institution obtains its data Build an inventory of data assets. For each one, establish a written plan for: Identification Prioritization Capture Storage Linkage Curation	How people make decisions and behave with respect to how data will be defined, produced, used, stored, and destroyed Establish: Decision-making body and rules Data dictionaries Data stewards
Data Quality	**Data Access**
How data will be maintained to be complete, valid, consistent, timely, and accurate to make them appropriate for a specific use	How authorized individuals can obtain and use data while maintaining privacy and security Establish written plans for: Accessibility Security

Data Usage & Literacy	Data Extraction & Reporting	Data Analytics
How data users understand and use data Establish: Data user responsibilities Training/education protocols Usage metrics	How data will be queried and retrieved from storage and delivered to users Establish protocols for: Extraction Reporting	How data will be used through dynamic and visual deployment for benchmarking, exploratory and causal analysis, and prediction and forecasting