

How a Non-Profit Organization Modernizes their Data with a Centralized Data Warehouse

onebridge



Confidential Client

A non-profit organization in the public school sector

Challenge

The client is a non-profit organization whose primary purpose is to create a future where every child in America has the opportunity to earn a high-quality public education. They provide data, tools, research and strategic guidance to communities, candidates, and elected officials so they have the necessary resources to make informed, long term, and systemic changes to public schools to make the greatest impact possible.

Prior to the client engaging with Onebridge, they had no defined method for centralized reporting and no data strategy in place to support business operational use cases. Not only was the client using manual processes to extract results, but they were also producing these reports in multiple toolsets, all in varying stages of maturity, from spreadsheets to commercial platforms.

This decentralized structure was time-consuming and prevented our client from reaching their full operating potential because their data was inconsistent and hard to blend across sources. The lack of data-focused initiatives resulted in our clients having a limited view of their data and employees who are unaware of the data they have, where it resides and how it can benefit their role.

The client knew they needed to engage the minds of Onebridge's expert engineers to stabilize their data strategy and deliver time efficient reports with trustworthy, accurate and accessible.

Approach

Onebridge approached this project with three key goals to improve the reporting process for the organization. These key goals are:

1. Establish Centralized Data Warehouse
2. Unify data pipeline as much as possible
3. Create true reporting schemes that end users trust as source of truth

To accomplish these goals, Onebridge had to design a centralized data warehouse that would allow the client to monitor, access and share data that they could trust. Before decisions could be made on what needed to change, the team needed to understand the client's current procedures and how their data had been affecting each department.

Phase 1: Current State Assessment

Using our Modern Analytics Platform (MAP,) our team conducted a full assessment of their data strategy, execution, and enablement and compiled the major observations and findings to assess their current gaps and define their ideal outcomes.

During this phase, Onebridge conducted a series of discovery workshops, where they interviewed technical representatives, system & data owners, and business representatives across multiple functional areas. This process collected a full inventory of all data sources, business requirements, use cases, and a full analysis of all their current infrastructure and technologies. With a thorough understanding of how data has been created, collected, and utilized within the organization up until this time, the team was able to determine the client's needs and provide recommendations to establish a modernized data reporting structure.

Phase 2: Key Gaps and Recommendations

With the use of our MAP assessment, Onebridge was able to identify key gaps in the client's current processes and determine where changes need to be implemented to modernize their data. Based on these findings, the team compiled their key recommendations to move the client to their desired future state of operation.

Data Strategy: The team recognized that one of the client's biggest obstacles was their inability to trust their data when making decisions. Onebridge recommended establishing a data strategy that focuses on providing value to the business. This strategy should consist of several initiatives including establishing a Demand Management Process for intake and prioritization and ensuring data lineage is well understood so that data can be trusted for use in decision-making.

Data Architecture: The client had an existing Snowflake platform but still needed a better way to integrate data that is understandable and accessible to business owners. The team suggested the client leverage Snowflake as an operational data warehouse by defining the pipelines of data from varying sources to Snowflake, establishing an



ETL/ELT strategy and implementing data modeling procedures.

Tools: During this phase, the team also made recommendations of tools that could support the client in modernizing their data practices. They recommended FiveTran as a standard integration tool for its Snowflake and source connector and it's a SaaS tool. The client had been using manual processes for reporting, which was time consuming and inefficient, so the team suggested the adoption of Power BI for internal operational reporting to provide a visually interactive way to gain business insights and support self-service. The final platform solution the team recommended to the client was Profisee to establish a data governance policy to support access, usage, data quality and data catalog.

Phase 3: Transition to Future State

In the final phase of this partnership, Onebridge illustrated the ideal "before and after," of the client's production data environment and detailed workstreams and activities to accomplish this transition. The team provided the client with a step-by-step guide to building and implementing a



centralized data warehouse. This workstreams addressed in this guide are:

- Data Governance
- Demand Management
- Data Warehouse/Storage
- Data Integration
- BI Platform
- Dashboard Creation

For each of these work streams, the team explained activities recommended to complete these projects. These activities detailed the processes, training and tools that should be considered during the implementation process.

Outcome

During this partnership, Onebridge provided the client with a complete picture of their current state, gap analysis, and future vision of a consolidated data warehouse with a

full implementation roadmap for execution. Incorporated into this roadmap are new processes and solutions for data governance and management that will ensure the quality, integrity, and access security of their data moving forward.

The result was a data system and infrastructure far simpler and consolidated than the client initially started with or thought they would need. The improved data source required fewer steps between collection and reporting, reducing potential issues and improving overall security and stability.

This engagement enabled our client to better serve their community with more timely, easy-to-read data insights, and boosted their fundraising capabilities through better collection and analysis of donor information. Also, the new automated data management solution greatly improved their confidence in the data as an organization.

For more information, or to speak to an expert at Onebridge, [contact us here](#).