

Choose your seat wisely - your seat determines your role, your team, and your council

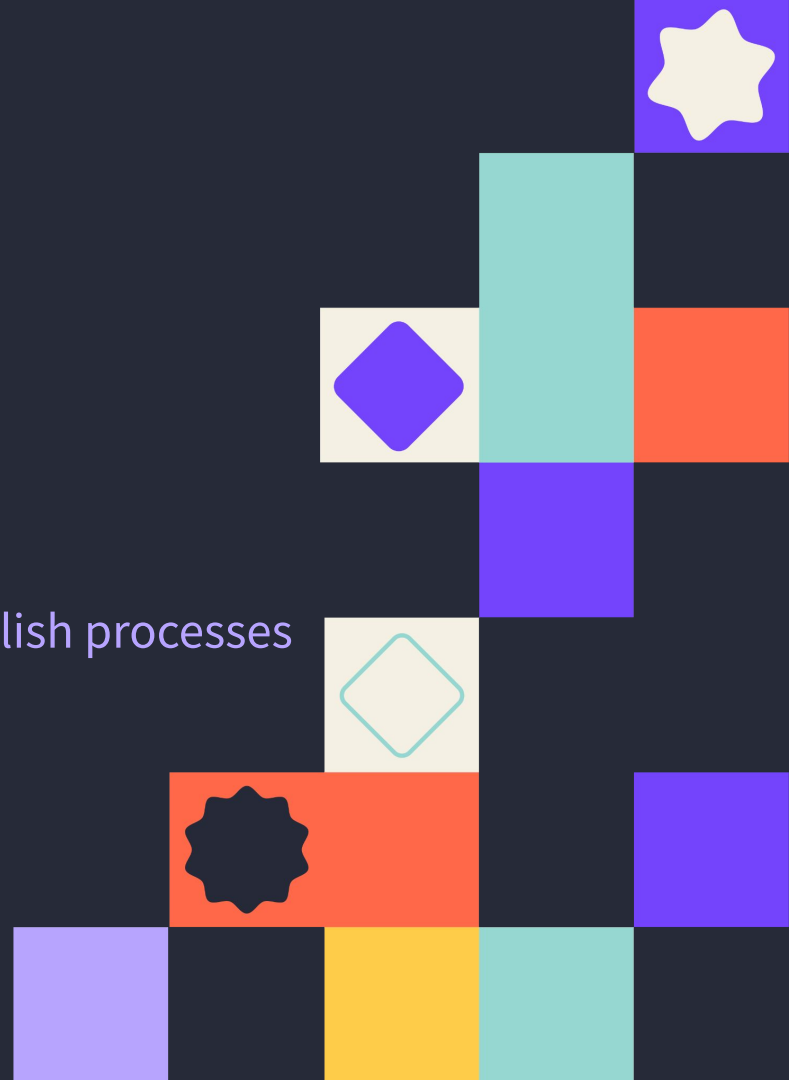
Play fair: Please do not flip over the role sheets (yet)



Governance co-lab

We the people, in order to govern data, do establish processes

October 8, 2024





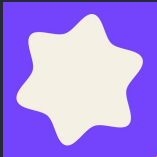
Meet your facilitator & game director



Jenna Jordan

Data Management Consultant

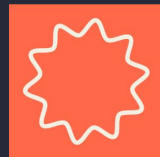
Analytics8





Simulation Setup

Know the ground rules





Simulation Setup Agenda

1

Rules of the Game

Remember: it's all made up anyways. Use your imagination if there's no documentation.

2

Win Conditions

Collective wins & team wins...
Everybody can win but some people will win more

3

Schedule

We only have an hour and a lot to do - every second counts

4

Scenario Setup

Introducing Rainbow Road, a fictional pet rescue non profit

5

Teams Overview

5 teams, 2 people per team

6

Let's play!

Starting in 5 minutes...



Rules of the Game

- Each table represents a single Mesh Council.
- Each table/council has 10 roles (seats), composed of 5 teams (so everyone has a partner)
- Every seat has a Role Sheet. Do not look at other people's role sheets. Make sure your secret missions remain a secret!
- There will be 3 council sessions, each lasting 10 minutes. Use your time wisely.
- The “Data Leadership” team is in charge of facilitating the discussion during council sessions, making sure final decisions are recorded by the 3rd session, tallying the final vote, and reporting back to the larger group on the final policies
- This is a role playing game. Don't play as yourself - play as your role!
- If something is not already documented, you have the freedom to use your imagination. But, you only have authority to imagine for your own role, not for someone else's role.
- Have fun!



Everybody can win in theory, but some people can win more... and gain bragging rights

Remember... The real win is having fun, learning something new, and making friends

Win Conditions



Requirements for a collective win for your Mesh Council (your table)

- You have a final set of policies documented on the table's paper pad

AND

- A majority vote approves the final set of policies



Requirements for an individual win (role and team)

- You achieve your team's & role's secret missions
- OR
- Your team's priorities are met & codified in the approved final set of policies



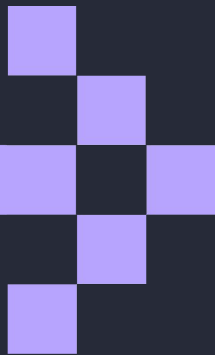
Schedule

Start time	Duration	Activity	Description
11:15 am	5 min	Simulation setup	This is what we're doing now
11:20 am	10 min	1st Council Session	Intros & establish governance structure
11:30 am	5 min	Emergency Scenario	Solve a data emergency with a process
11:35 am	10 min	2nd Council Session	Outline overall strategy
11:45 am	5 min	Roles Sidebar	Cross-council sharing for same roles
11:50 am	10 min	3rd Council Session	Finalize strategy & hold a vote
12:00 pm	15 min	Present your plan	Share your council's plan in 1 min



Scenario Setup (see Architect's Handbook for more details)

- Rainbow Road is a (fictional) pet rescue non profit that started out as a local rescue bringing pets from rural shelters to urban areas for adoption, and now is a national nonprofit that has scaled up the model across many partners and provides centralized operational support
- Initially, a central data warehouse for unified data management and reporting was very useful and helped Rainbow Road grow to a national scale, and dbt was used by a single central data team to manage the transformations in this data warehouse
- Now, the single central data warehouse is unable to adequately serve the multiple data teams across the organization that can operate independently within their domain - the centralized structure has become a limiting factor, and it's time to decentralize
- A data architect consultant was brought onboard, and they came up with a design for Rainbow Road's data mesh, implemented through a dbt Mesh of multiple projects. An initial migration to 4 distinct dbt projects has been completed.
- Representatives from each of the core business domains and the legacy centralized data team have convened on a Mesh Council to come up with a governing model, formal policies, and a set of standard processes for working in this new data mesh environment of multiple dbt projects.



Meme break, brought to you by Tiankai Feng



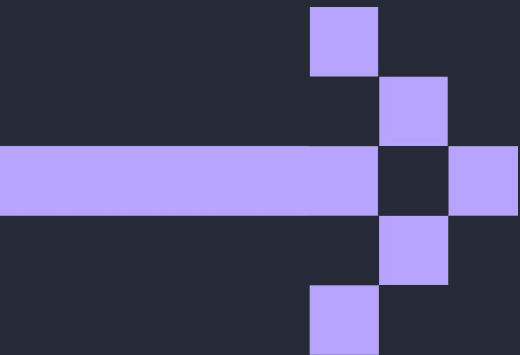


If your table is not full,
aim to have at least 1
person per team
(minimum of 5 people
needed)

Teams have 2 distinct
roles, with distinct
responsibilities, but
share goals (and secret
missions)

Overview of teams

- **Data Leadership:** responsible for facilitating discussion, documenting policies, and presenting out final decisions
- **Data Platform:** represents the legacy central data team (data engineers & analytics engineers), and owns the Data Platform dbt project
- **Finance & Marketing:** represents the finance & marketing domains (fundraising, grants, outreach campaigns), and owns the Finance & Marketing dbt project
- **People Ops:** represents the HR & partnerships domains (employees, volunteers, partners), and owns the People Ops & Partnerships dbt project
- **Rescue Operations:** represents the reporting & operational use of data for rescue, shelter, and adoption operations across many regions



Let's play!



Simulation Starts Now

Channel your inner theatre nerd, & assume your roles





“We cannot be mere consumers of good governance, we must be participants; we must be co-creators.”

- Rohini Nilekani

1st Council Session (10 minutes)

- Introduce yourselves (and your role/team)
- Review your role sheets
- Review the Architect’s Handbook
- Establish a governance structure for the council to abide by - what is the process by which an idea becomes a formal policy for the entire data mesh? How will these policies be enacted & enforced?
- Remember, this governance structure can be iterated on, but it should also apply for future council sessions (after the 3rd & final session for this simulation exercise)



Emergency Scenario (5 minutes)

- A Finance analyst updated the logic for a model in the Data Platform project, because a model in the Finance & Marketing project that references the Data Platform model needed the logic change (e.g. altering a case statement).
- This change to the Data Platform model ends up breaking a model in the People Ops & Partnerships project, because it also references the same Data Platform model.
- A People Ops analyst requests that the change to the Data Platform model be reverted until they have time to incorporate the change in logic.



“Everything we do in (public) policy prevents us from doing something else. To govern is to choose.”

- Richard Lamm

2nd Council Session (10 minutes)

- Outline the overall strategy for your dbt Mesh policies
- The policies should answer these questions in broad strokes:
 - What needs to be the same across all projects in the mesh, vs when do individual projects have autonomy?
 - How does data get shared between projects - what rules must “public” models follow?
 - What will the final project graph look like? Are there additional/removed projects? What are the project dependencies?
 - In the future, how can new projects be created (or split off from an existing project) or existing projects be consolidated?



Cross-Council Sharing (5 minutes)

- Each role is numbered (see the Role Sheet)
- Please convene at the table with the number that matches your role number
- This is your opportunity to strategize with others that share your role, across the other Mesh Councils
- Who is on the path to achieving their secret missions?
- What ideas can you bring back to your Mesh Council?

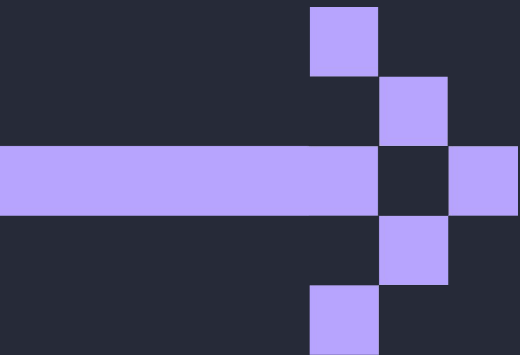


“If you can’t describe what you’re doing as a process, you don’t know what you’re doing.”

- W. Edwards Deming

3rd Council Session (10 minutes)

- Finalize your overall policies, using the governance structure agreed upon in the first session
- Flesh out any component processes as needed, for future policy-making
- Document your policies & processes to the best extent possible
- Hold a final vote on the documented policies & processes as a whole
- Prepare to present out the results



Simulation Complete



Council Presentations

Sharing is caring... and time to show-off!





Present your plans (~1 minute each)

- How do decisions get made?
- What core decisions were made?
- What problems were solved?
- What problems were not solved?
- What did you learn from the experience?
- What would you do differently next time... or in a real mesh migration situation?



Wrap Up

Save your work

- Take a picture of your table's paper pad
- Share it out - slack, social media, etc

Grow your support network

- Stay connected with your Mesh Council
- Join this session's slack channel:
#coalesce-peer-exchange-1

Reach out

- Find me on LinkedIn:
<https://www.linkedin.com/in/jennajordan1/>
- Analytics8 at Coalesce:
<https://www.analytics8.com/dbt-coalesce>



Thank you

