Data Governance: Best Practices

The most important aspect of any KPI Dashboard is that it is trustworthy. Data must be managed and governed to assure validity and reliability. Ensure the following practices are in place:

1. Clear Ownership and Accountability

Assign Data Owners (usually senior leaders) responsible for approving KPI definitions and ensuring alignment with strategy.

Assign Data Stewards (operational staff or analysts) to monitor data quality and enforce standards.

Assign IT/Data Administrators to manage systems, security, and technical integrity.

Assign a named "KPI Owner" accountable for its accuracy and relevance.

2. Standardized Definitions

Maintain a central data dictionary/glossary that includes KPI name, definition, numerator/denominator, formula, source, refresh frequency, owner.

Eliminate ambiguity (e.g., define "follow-up within 7 days" precisely).

Require governance approval before any definition change.

3. Regular Review and Refresh

Establish a review cycle: at least quarterly, ensure KPIs still align with strategy.

Retire outdated KPIs and add new ones as organizational priorities evolve.

Audit dashboards for consistency across departments (avoid multiple "versions of truth").

4. Data Quality Controls

Automate data pulls where possible to reduce manual entry errors.

Apply data validation rules (completeness, timeliness, accuracy checks). Document data sources and transformations for transparency.

Use exception reporting (flagging missing or outlier data).

5. Security and Access Controls

Apply role-based access (executives see summaries; managers can drill into detail).

Track dashboard usage and access logs to maintain compliance (especially under HIPAA for behavioral health).

Protect sensitive patient and financial data while ensuring leadership visibility.

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6. Feedback and Continuous Improvement

Solicit feedback from dashboard users on clarity and usability.

Incorporate changes while preserving standardized definitions.

Provide training for executives so they interpret KPIs consistently.

7. Governance Structure & Documentation

Establish a Data Governance Committee (cross-functional leadership + IT + clinical + finance). Document policies for KPI creation, change control, and retirement.

Publish a KPI Governance Charter so roles and responsibilities are clear across the organization.

Summary:

Data governance ensures KPI dashboards are trusted, consistent, and decision-ready. Without governance, dashboards risk becoming cluttered, inconsistent, or mistrusted, which undermine their value as executive tools.