



# Data Driven Decisioning-Making for Organizational Success

July 29, 2025



Bellwether envisions a future where *all* young people have access to an **excellent education and live lives filled with opportunity.**

We provide support in strategic planning, academic and program design, policy analysis and development, measurement and evaluation, and research and field-building publications.

We serve clients in early childhood, K-12, postsecondary, and workforce.

Our clients include district, charter, and private school systems, nonprofit program providers and intermediaries, philanthropies, research and advocacy institutions, institutions of higher education, and local, state and federal government.

## Driven by Mission



Our mission is to fuel social mobility and close equity gaps  
by empowering and advancing all learners.

We use the power of coaching to support individuals in  
achieving their educational and career goals — transforming lives  
and organizations while creating social change.

# Coaching tailored to the individual learner

## The Five Elements of Coaching

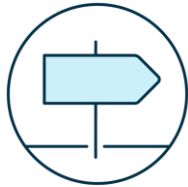
Coaches utilize these core skill sets to personalize their support for greatest impact.



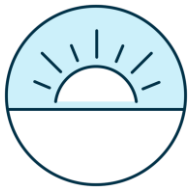
**Building Relationships**



**Assessing**



**Advancing**



**Building Motivation**



**Strategizing**

## Knowledge, Skills & Beliefs



**KNOWLEDGE**

Empower students to understand themselves, their institutions, and resources that will support their goals.



**SKILLS**

Support students as they identify and develop the abilities that will promote their goals and enhance their school experience.



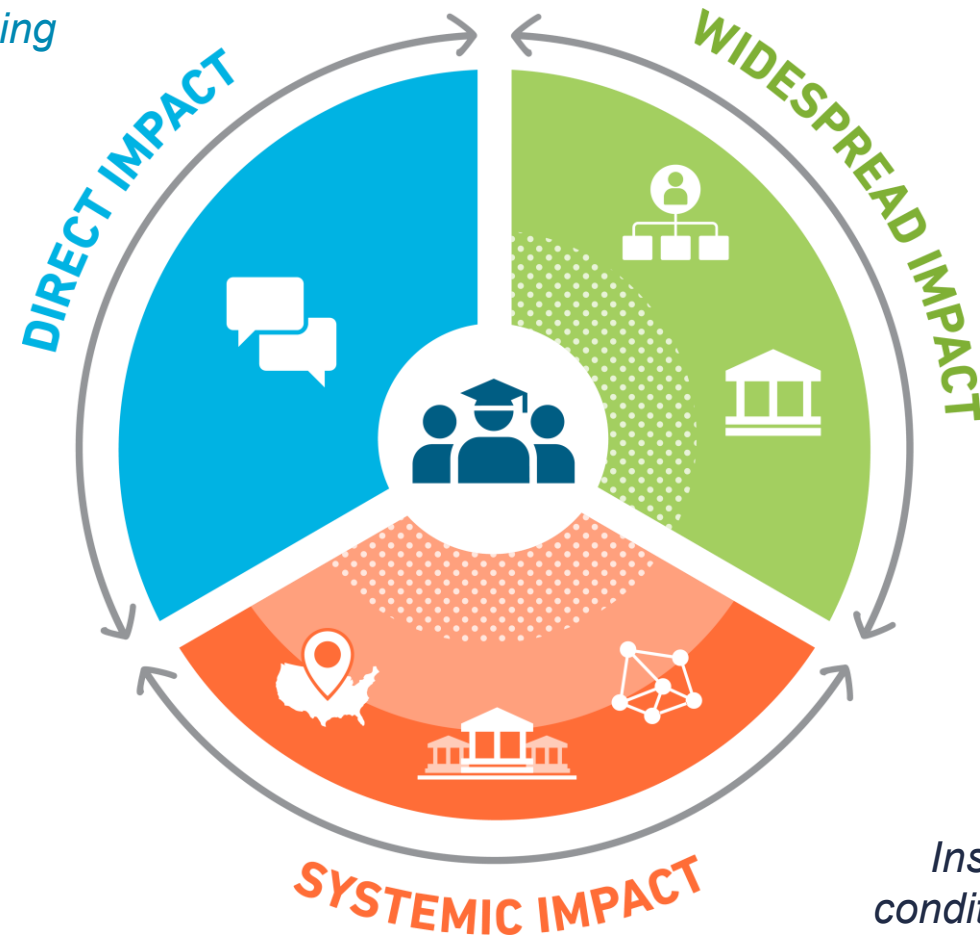
**BELIEFS**

Celebrate and reinforce the beliefs that are serving students' values and goals.

# Our impact framework

*InsideTrack provides direct programming*

*InsideTrack builds partner capacity to implement programming*



*InsideTrack creates conditions for adoption of our programming and vision for change*

# InsideTrack's impact

## DIRECT IMPACT

Students Served  
**3.5M**

Learners Trained in Coaching Methodology  
**1,253** 2024

Coaches Certified  
**478** 2024



## WIDESPREAD IMPACT

Capacity Building Students Served  
**220K**

Capacity Building Partnerships  
**162**

Coach & Trainer Network Members  
**1011**

## SYSTEMIC IMPACT

**64%**

Partner Response: “We have made systematic changes in how we serve/support students due to our partnership.”

# Introduction to data driven decision-making

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# Why is data driven decision-making hard?

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- **People can disagree about data:**

- There can be strong disagreement about what to measure.
- There can be strong disagreement about how to measure.

- **Capturing data is not easy:**

- It is not costless.
- Taking credit for outcomes can be challenging for some program models.

- **The results captured by data have consequences:**

- Data is rational; systems change is political.
- Measuring and reporting data can win friends and make enemies.
- Measuring and reporting data is an act of accountability - it can be high-stakes.
- Measuring and reporting data is an act of power.



# So why do it?

## Value of being data driven

Being data-driven equips organizations in:

- Planning, setting priorities, and properly resourcing those priorities.
- Managing and maximizing execution and impact.
- Learning about what works (and for whom) and what does not in order to best deploy scarce resources.
- Demonstrating impact to:
  - Attract partners, allies, and funders.
  - Shift mindsets and ultimately the actions of others, including in policy.

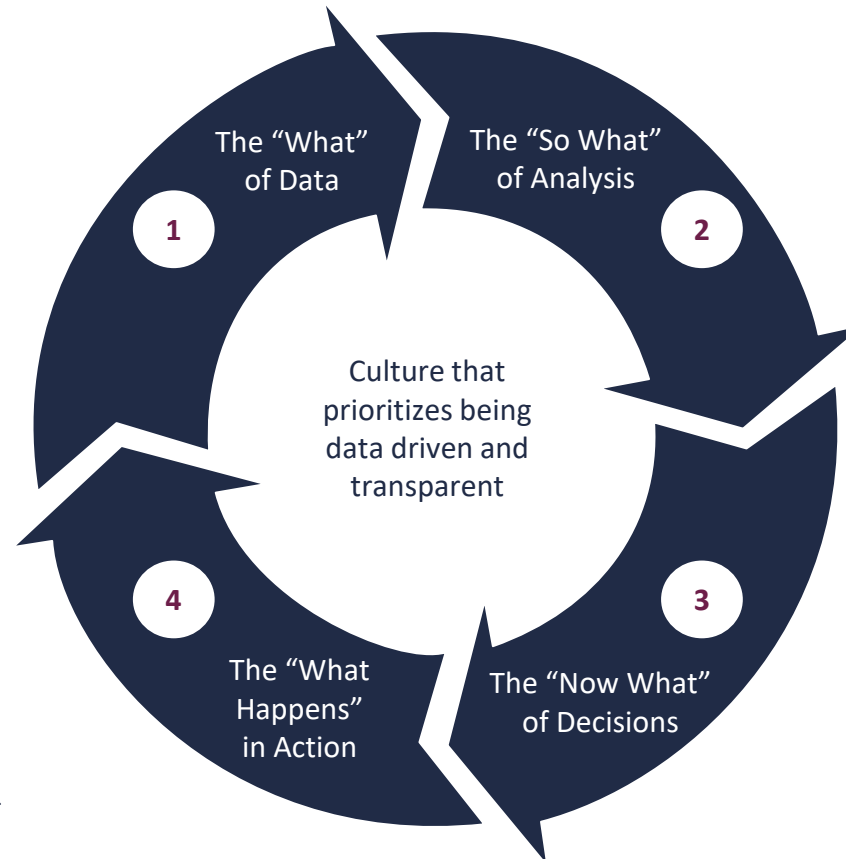
# Data driven decision-making requires organizations to build their capacity in four areas

## Data, Targets, Dashboards

- Right data with agreement on method for collecting.
- Right format for ease of understanding and for running sensitivities/scenarios.
- Right timing and frequency.

## Workplanning

- Convert decisions into plans of action.
- Create conditions and expectations to ensure successful execution and follow-through of that plan.



## Analysis

- Right team comes together to analyze data.
- Find connections across and within data in order to identify the "root cause" (or a strong hypothesis to test) of performance.

## Decision-making

- Clear process for making decisions.
- Develop set of options.
- Decide which option(s) to act on.
- Communicate decisions.

# The first step in becoming data driven is determining what data to collect and then use

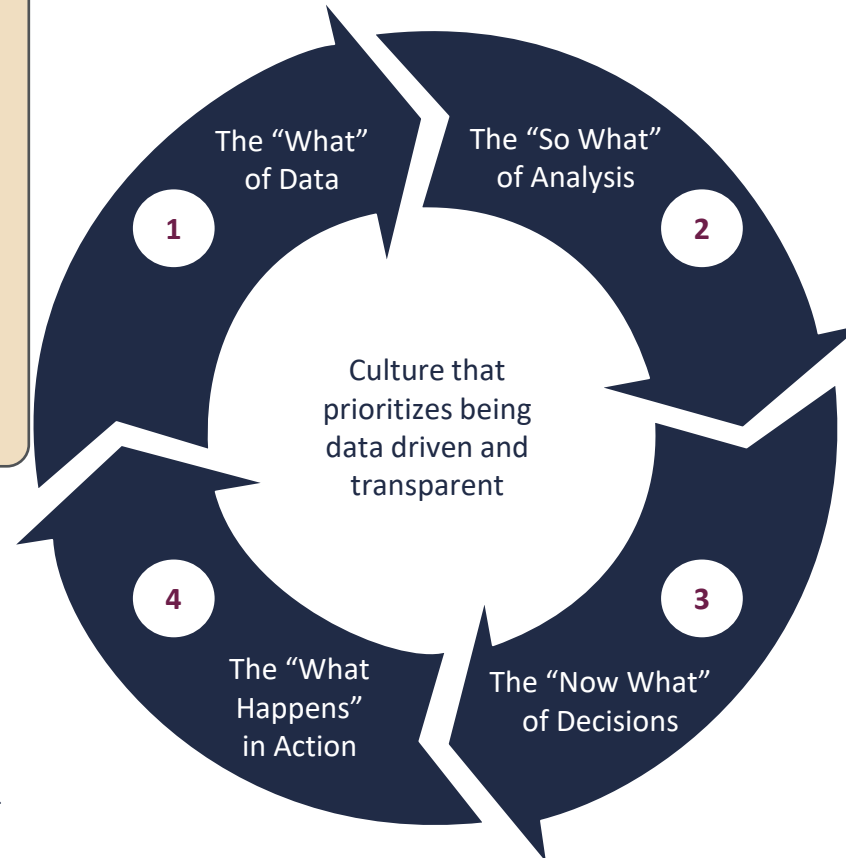
## Focus of Today

### Data, Targets, Dashboards

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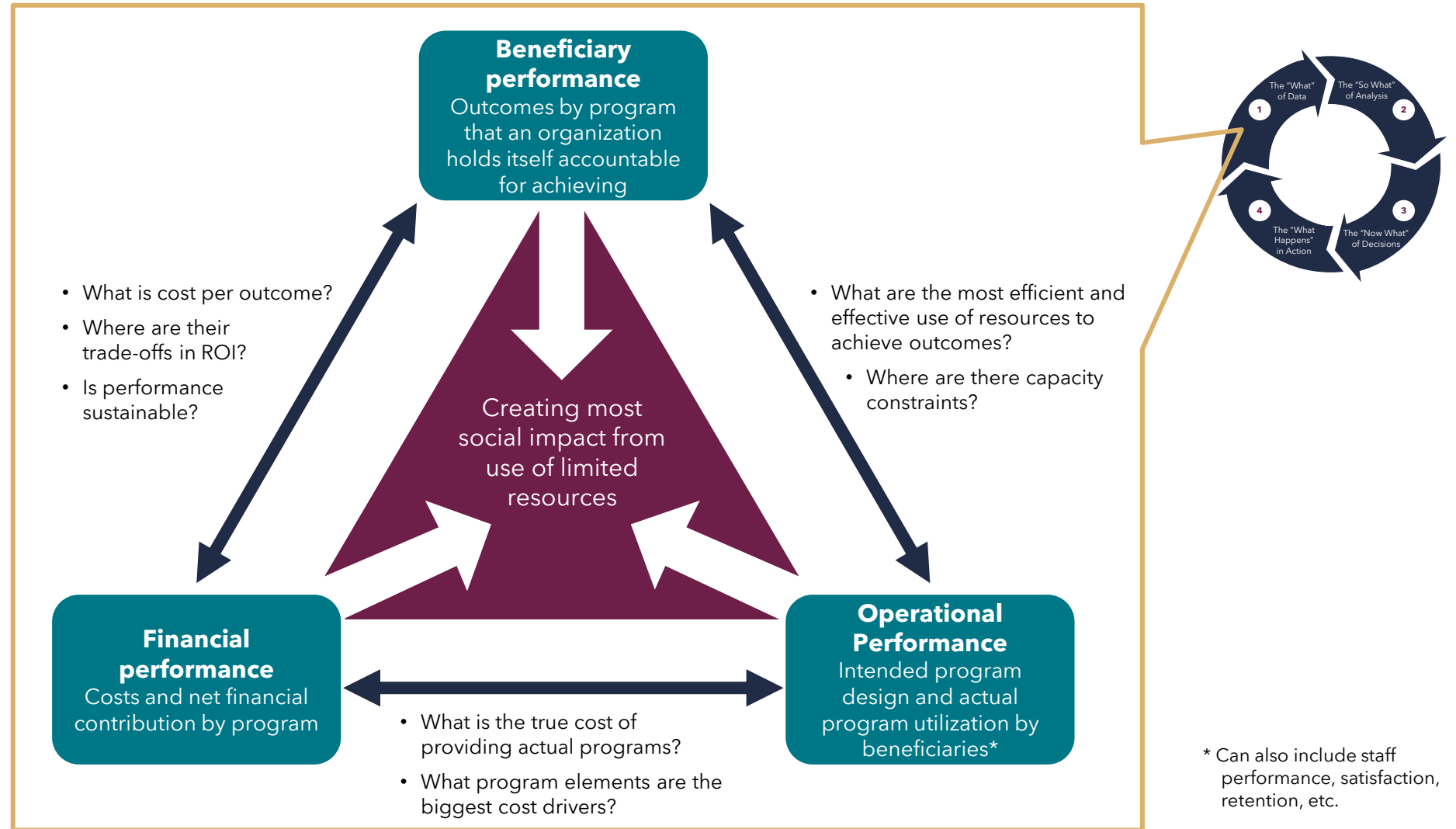
### Analysis

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# There are three major categories of data that organizations can capture and combine to inform decision-making



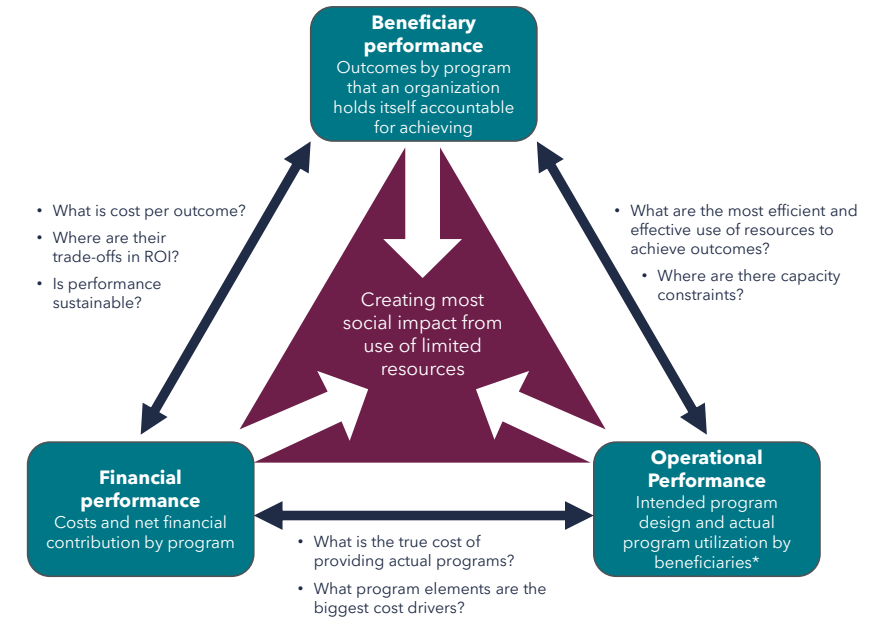
# Having this data - and being able to compare **intended** to **actual** performance - can unlock significant value for organizations

- **Internal planning and management:**

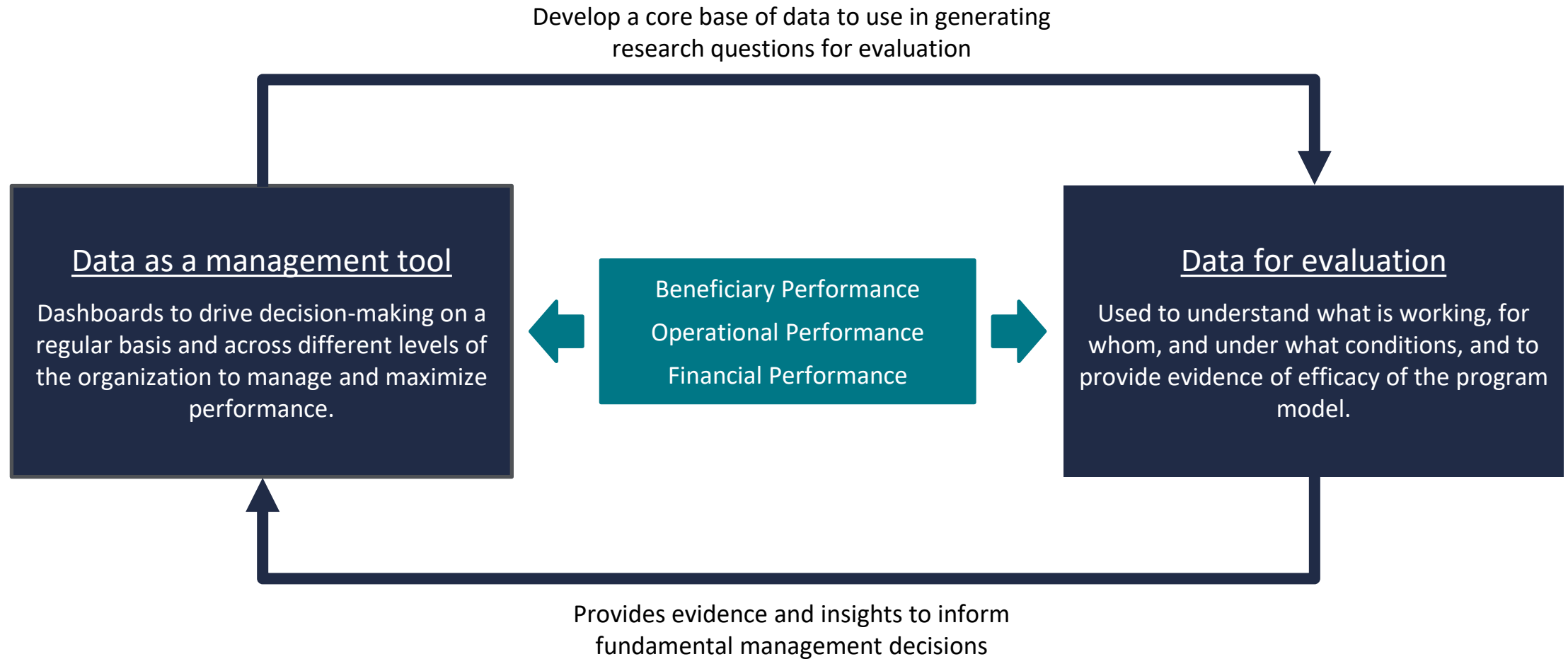
- Understand **what programming is and is not creating value** (or levels of value) for different beneficiaries.
- Understand **the true resource requirements to execute** - money and talent but also time, systems, and partnerships.
- Make decisions on program design(s) and **innovate/pilot program design variations** to understand trade-offs in outcomes and ROI.
- **Make trade-offs about who an organization serves and how many it can grow to serve** over a specific period of time.

- **External engagement and growth:**

- **Right-size fundraising and/or contract pricing** to meet resource requirements for a program design and to be competitive.
- **Articulate expectations to partners** about non-negotiables in program design (and conversely what is flexible/customizable).
- **Communicate results and impact** to beneficiaries, funders, and other stakeholders.
- **Systemic Impact:** When thinking about more ambitious adoption by systems, understand what specific program design or designs to advocate for in seeking to change system-level policies, practices, and funding flows.



There are two ways organizations can capture and use data for decision-making – data for management and data for evaluation – both of which are mutually reinforcing



## InsideTrack sought to improve its use of data for *both* management and evaluation

In both use cases, Bellwether used a **four-step process** to ensure that InsideTrack could build the right set of data to monitor organizational health and impact ,and drive future decision-making:



**Step A: Define ideal state of data**



**Step B: Crosswalk to current state of data**



**Step C: Organize existing data and begin to use**



**Step D: Create a roadmap to add data to advance closer to ideal state**

## Part 1 – developing dashboards to support data driven management

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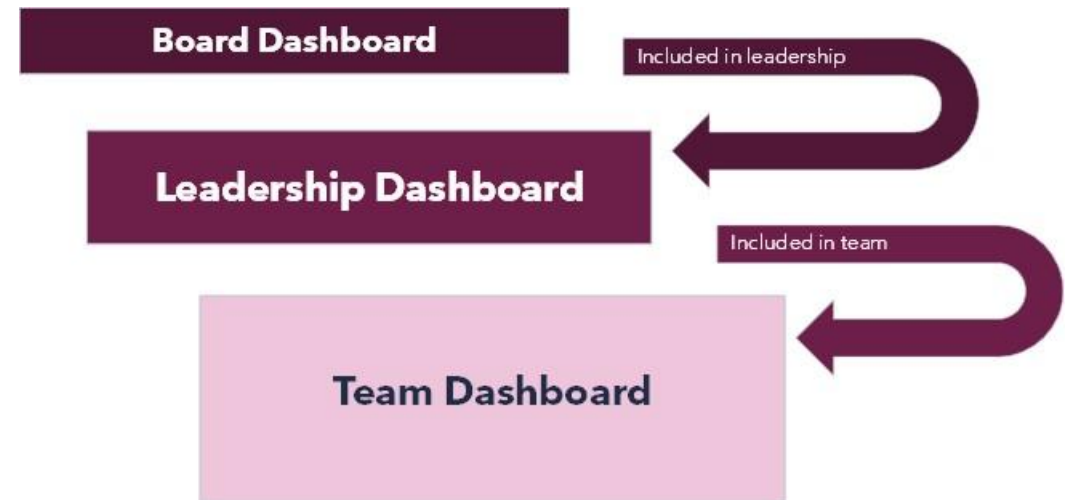


# What do we mean by a dashboard?

## What makes a good dashboard or set of dashboards:

- Provides data that is **important to driving insights and then decisions** that will advance impact.
- Is shared with the **right frequency** to be actionable but balanced with when data becomes available.
- Is shared in a **visually accessible** way for data to be easily understood.
- **Segments data as needed** (for example, by program/business lines, beneficiary populations, geographies, partner types, etc.) to enable insights and decisions.

- **Is deliberate about providing the right level of detail to the right audience** (but also being prepared for stakeholders to want to double-click into detail).



To build InsideTrack's dashboards, we used the four-step process to understand what data was needed for decision-making and how to organize it



### Step A: Define ideal state of data

- What decisions do specific users of this data want to be able to make?
- What data would they ideally have in order to make those decisions?



### Step B: Crosswalk to current state of data

- What data does an organization already have?
- What additional data can it easily access and combine with existing data?
- What data does it wish it had, but will take significant effort and time to access?



### Step C: Organize existing data and begin to use

- Use existing or easily accessed data to assemble a V1.0 of dashboards.
- Begin to use dashboards to drive decision-making. Iterate on how data should be visually presented, the frequency it should be shared (and with whom), and what additional new data would be valuable to add.

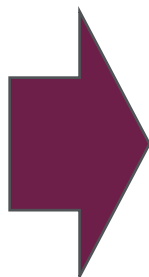


### Step D: Create roadmap to add data to advance closer to ideal state

- Design and execute a roadmap for accessing additional valuable data not available for V1.0.
- Continue to refine the content and visual representation of data through use.
- Continue to collect and integrated new data as needed and sunset data that is not helping in driving decisions.

InsideTrack crowdsourced 114 aspirational impact measures from leadership and staff and then identified the highest priorities

- For each type of impact, each working group (leadership and key staff) brainstormed measures for program design, outputs, and outcomes for learners, coaches, staff, and partners.
- After brainstorming, each team member noted their level of interest (0-no interest to 3-high interest) in tracking that measure for impact.

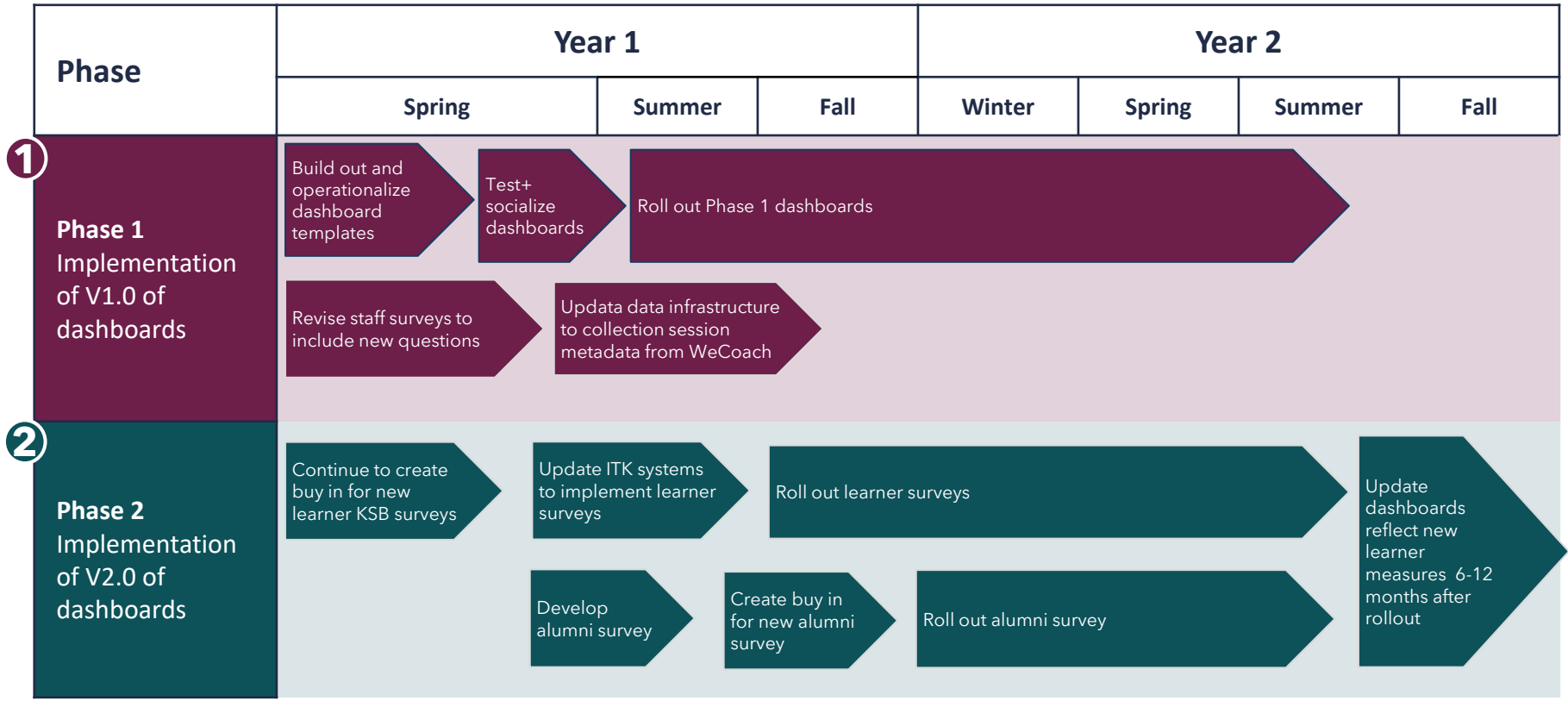


	Criteria	Key question
Value	<b>ITK Interest</b>	What data is ITK most interested in being able to use to drive decision-making?
	<b>Data Availability</b>	Is the data available? (data is already being collected by ITK or not currently being collected by ITK)
Feasibility	<b>Data Effort</b>	If the data is not currently being collected, how difficult would it be to collect this data?

Leading Questions		Metric	Average Rating	Data Source	Notes
Guiding Questions					
	4% of partner institutions	2.9	Already captured by ITR as a part of State Reporting. See 323		
	4% of partner institutions serving high priority		As a part of State Reporting, ITR already captures % of partners that send us an issue forwarder for 100% that grant eligible students. Please benchmark to 100 (and let) This could be the same or they requested to include other high		
How many learners is IT reaching?	4% of partner institutions serving high priority				
<b>Coach Outputs</b>					
Guiding Questions	Metric	Average Rating	Data Source	Notes	
	Average time to coach certification	2.0			
What does the coaching infrastructure look like?	# of ITR coaches	2.1			
	Learner-to-Coach ratio	2.9			
	Average ITR coach compensation	2.2			
Do coaches feel they received adequate/sufficient training to do their job well?	4% of coaches who feel they received adequate/sufficient training to do their job well	2.6	These metrics can be measured by ITR's existing Pulse/Sky survey or a coach-specific survey	Notes that this originally was "received adequate/sufficient COACHING to do their job well", changed coaching to training	
Do coaches who feel that they can effectively use resources across different types of partnerships?	4% of coaches who feel that they can effectively use resources across different types of partnerships	2.5			
<b>Coach Outcomes</b>					
Guiding Questions	Metric	Average Rating	Data Source	Notes	
	4% of coaches				
Are coaches performing as expected?	What is ITR's return reach?	# of members in the ITR coach network	3.0		Wagner S. Suggested a need to track network engagement in addition to network reach. Are there any metrics or network engagement that would be meaningful on a leadership level?
	# of members in the ITR coach network	3.0			
	Average	3.0			
	# of partners	3.0			
	4% of high priority partners in g. metrics	2.9			
	# of staff undergoing ITR certification (coaching certification, leadership certification, developer certification, trainer certification)	2.8			Notes that there are 4 types of certification so rather than tracking trainer certification it could be more meaningful to track all. The metric could then also be used to further disaggregate outcomes.
	What is ITR's partnership reach?	# of ITR certified trainers at partner institutions	3.0		
	# of ITR certified coaches at partner institutions	2.8			
	# of ITR coaches being trained by ITR certified trainers	3.0			Flagging that there might be a type here - I believe originally meant a # of staff being trained to be coaching by ITR certified trainers rather than institution (senior trainers from ITR)
How many learners is IT reaching through partnerships?	# of learners served by partners	2.3			Wagner suggested that the metric should be learners served by staff who are trained in the ITR model. Wagner B suggested that getting this metric would be hard
	4% of learners from high priority partnerships served by partners	2.1			



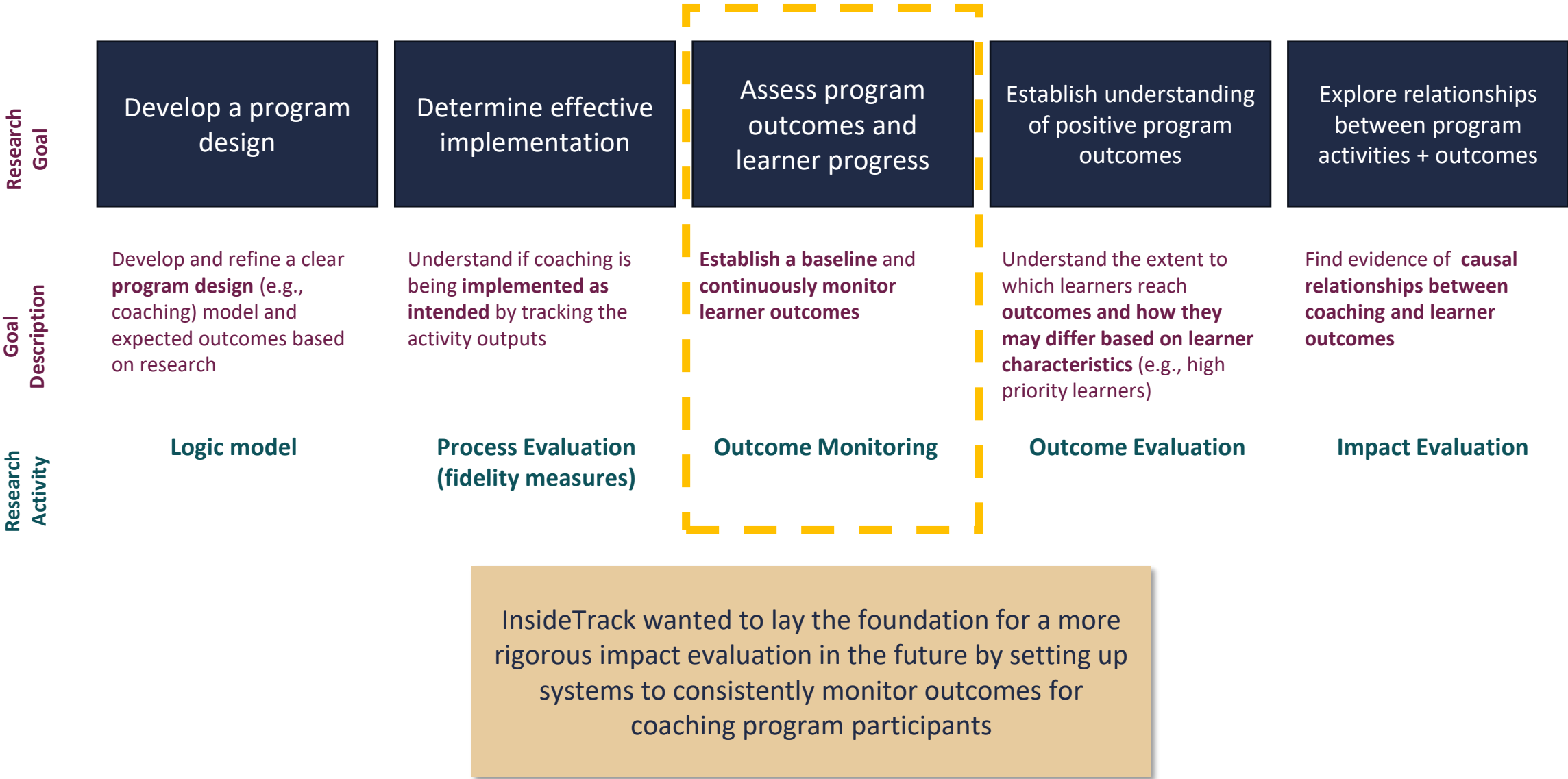
Implementation does not happen overnight. We laid out a scope and sequence over 18 months to roll out V1.0 of dashboards and prepare for a V2.0 set of revisions



## Part 2 – developing an evaluation plan

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# Evaluation can have many purposes; we identified InsideTrack's initial purpose for building a plan to evaluate the coaching program



The process of creating an evaluation plan included investing substantial time to define the program's model and prioritize what data is needed to measure success of that model



### Step A: Define ideal state of data

- If the program is implemented as designed, what are the expected outcomes and impact?
- What are the key evaluation questions about outcomes and impact that you need the evaluation to answer?
- What data is needed to answer those questions?



### Step B: Crosswalk to current state of data

- What data does the organization already collect that can be used to answer the evaluation questions?
- What additional data can it easily access and combine with existing data?
- What data does it wish it had, but will take significant effort and time to access?



### Step C: Organize existing data and begin to use

- Define the specific metrics and data sources that will be used to measure each key outcome.
- Refine and update existing data sources as needed.
- **Create a data collection and analysis plan** (who will collect and analyze the data, using which data source, on what timeline)

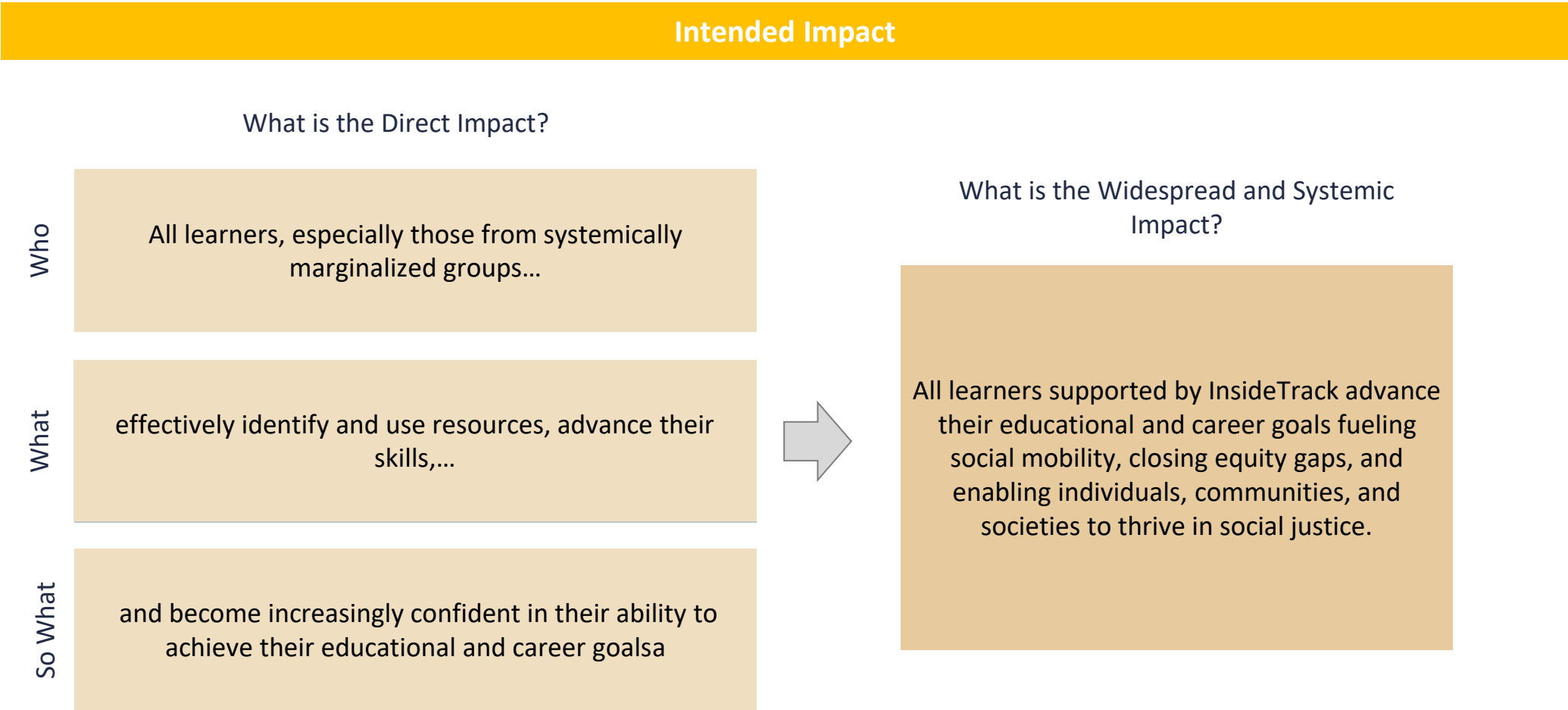


### Step D: Create roadmap to add data to advance closer to ideal state

- Design and execute a roadmap for accessing new data sources and/or building new data collection tools.
- Incorporate the new data sources into the evaluation plan.
- Continue to refine the data collection and analysis processes as needed.

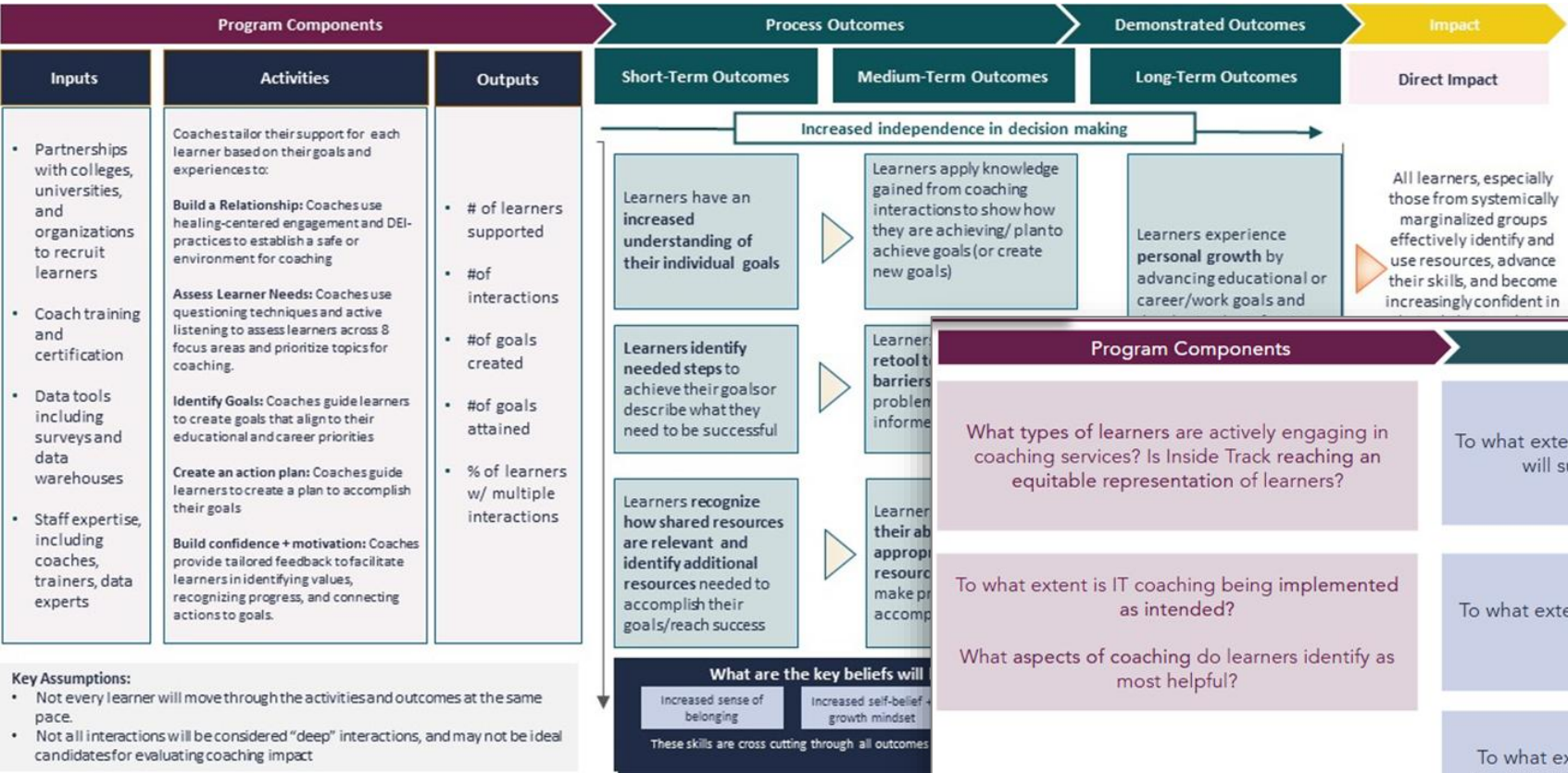


# We worked with InsideTrack to define an **intended impact statement** for the coaching program....

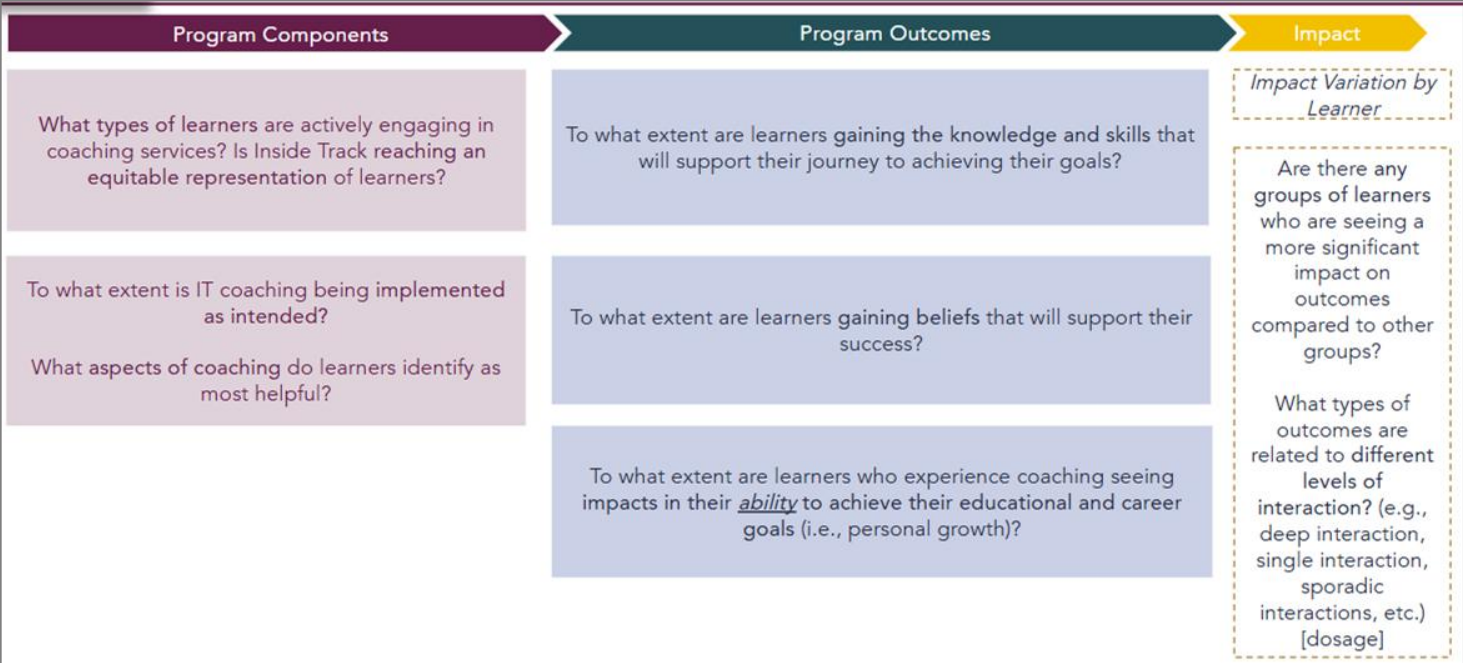


...As well as a **logic model** and **evaluation questions** to guide the evaluation plan

The logic model articulates how the program components will lead to the intended impact...



....And the evaluation questions are designed to explore whether the model is working as intended.

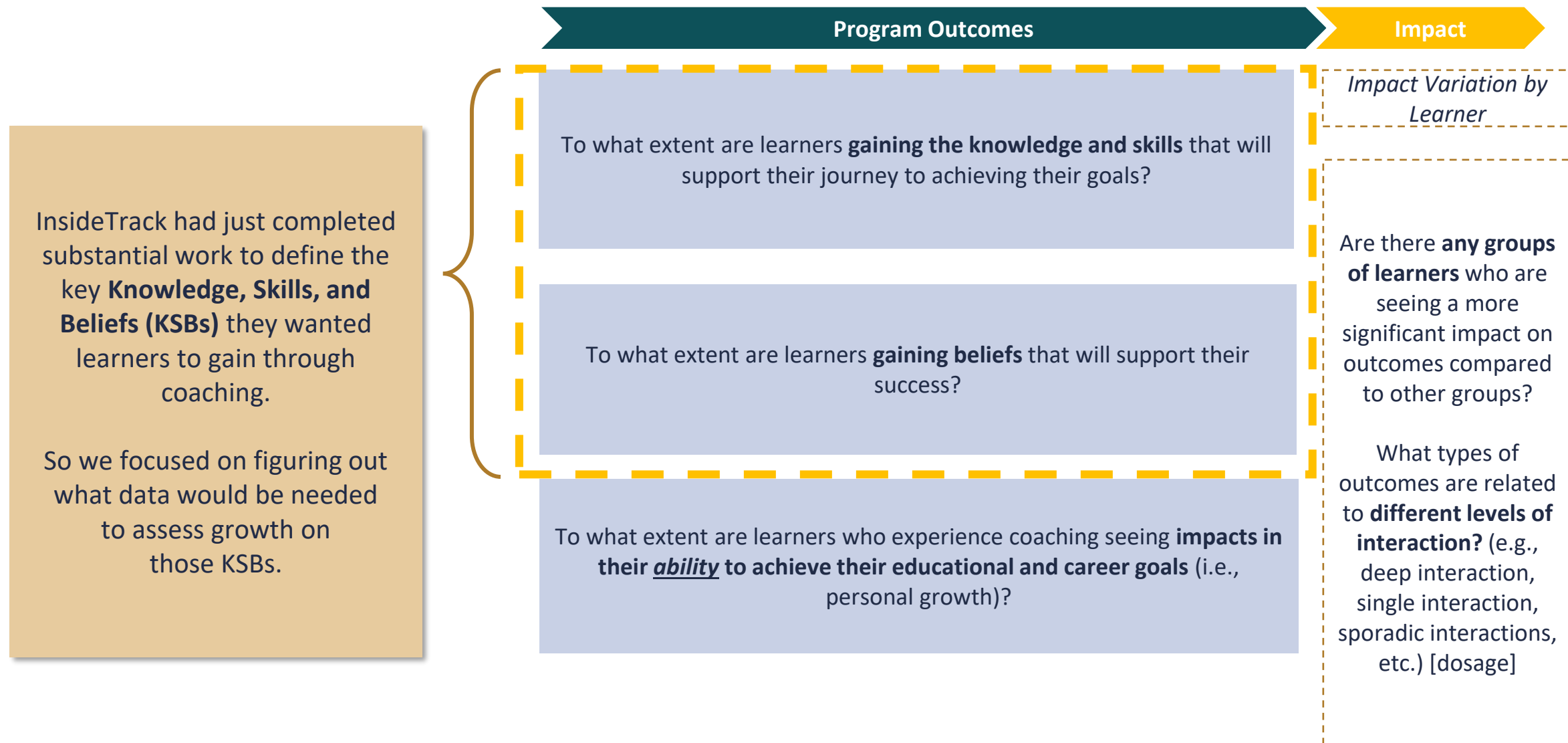




## STEP A:

Define ideal  
state of data

We also agreed to focus the initial evaluation plan on a priority set of program outcomes



We determined that InsideTrack's existing survey could be easily built out into a suite of surveys to better answer the evaluation questions

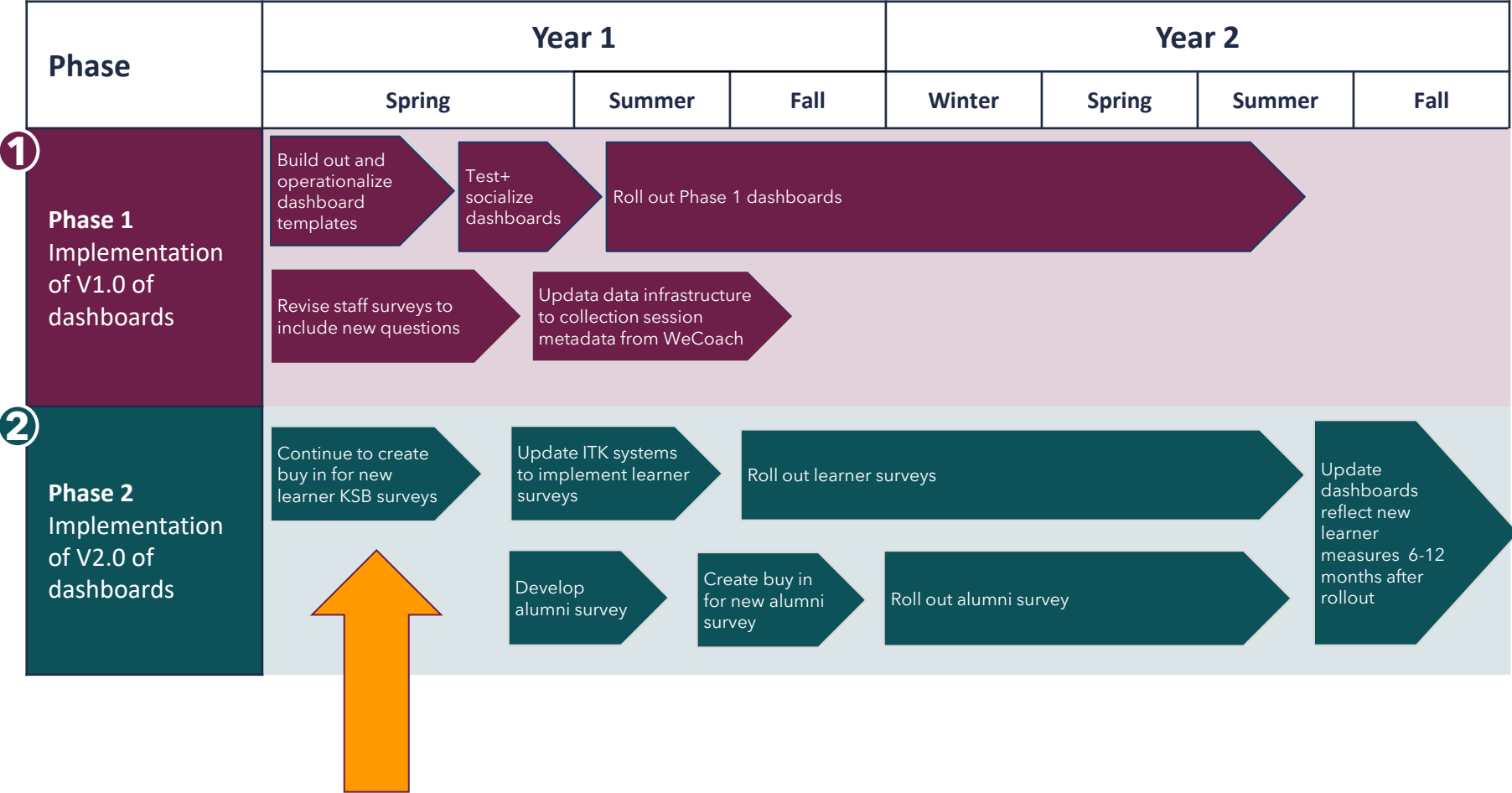
	Priority KSBs	Entry Survey (baseline)	Pulse Check	Milestone Survey	Coach Report	Exit Survey (Impact)
	Feedback (engagement, usefulness)		✓			
Knowledge	To what extent are learners <b>gaining the knowledge</b> that will support their journey to achieving their goals?	✓		✓ Milestone 1	✓	✓
Skills	To what extent are learners <b>gaining the skills</b> that will support their journey to achieving their goals?	✓		✓ Milestone 2	✓	✓
Beliefs	To what extent are learners <b>gaining beliefs</b> that will support their success?	✓				✓

Data Collection Tool	Purpose	Question
Learner Pulse Check Survey  3 items	The Learner Pulse Check engages learners in providing quick, real-time feedback throughout their coaching experience.  Linked with coach-provided insight about the content of the	1. How useful did you find today's coaching session?
		2. Do you plan to continue coaching after today's session?
Data Collection Tool	Purpose	Question
Baseline Learner Survey  12 items	The Baseline and Exit Surveys are cornerstone touchpoints and are essential to enable measurement of learner development across the coaching experience.	1. I understand my educational goals.
		2. I understand my career goals.
		3. I understand the steps needed to achieve my goals.
	The Baseline Survey establishes a comprehensive baseline of the learner's knowledge, skills, and behavior, which are measured again during the Exit Survey when learners complete their participation in coaching.	4. I am familiar with the resources available to me to help me achieve my goals.
		5. I feel confident in my ability to set goals.
		6. I feel confident in my ability to identify the steps needed to reach my goals.
	The Baseline Survey includes a total of 19 scaled response questions, in which the learner reflects on their understanding and self-assessed ability to set goals, plan goal completion, identify and use resources, and solve problems. The learner also reflects on priority beliefs, including growth mindset, self-efficacy, self-esteem, and sense of belonging via items selected from validated measures.	7. I feel confident in my ability to use available resources to help me reach my goals.
		8. I feel confident in my ability to ask for help when I need it.
		9. I feel confident in my ability to find a solution when I face obstacles towards reaching my goals.
		10. My intelligence is something about myself that I can't change very much.
		11. On the whole, I am satisfied with myself.
		12. I am able to do things as well as most other people.

Sample excerpt from the Coaching Program Evaluation Framework

	Priority KSBs	Outcome	Indicator	Proposed Data source
Knowledge	To what extent are learners <b>gaining the knowledge</b> that will support their journey to achieving their goals?	Learners identify needed steps to achieve their goals	#/% of learners who feel that they have knowledge around the steps required to meet their goal(s)	Learner Survey
			#/% of learners that can identify needed steps to achieve their goals or what they need to be successful	Coach Report
Skills	To what extent are learners <b>gaining the skills</b> that will support their journey to achieving their goals?	Learners can strategize or retool to account for barriers to goals through problem-solving and informed decision making	#/% of learners who agree they can identify obstacles to their goals and potential solutions	Learner
			#/% of learners can identify solutions for obstacles to their goals.	Coach Report
Beliefs	To what extent are learners <b>gaining beliefs</b> that will support their success?	Learners will have an increased sense of self-efficacy	#/% of learners with increased sense of self-efficacy	Learner Survey (changes between entry + exit survey)

# The roadmap for launching and piloting the new surveys was integrated into the dashboard roadmap



- Thank you for joining us!
- Do not hesitate to reach out with follow-up questions:
  - Bellwether: [Melissa.King@bellwether.org](mailto:Melissa.King@bellwether.org) and [Alex.Cortez@bellwether.org](mailto:Alex.Cortez@bellwether.org)
  - InsideTrack [Ruth.White@insidetrack.org](mailto:Ruth.White@insidetrack.org) and [Meaghan.Joyce@insidetrack.org](mailto:Meaghan.Joyce@insidetrack.org)
- More information about the Direct, Widespread, and Systemic Impact framework can be found on this link: <https://bellwether.org/publications/pragmatic-playbook-for-impact/>.