

# Data-Driven Decision-Making Template

Free Resource from Mission-Driven Momentum Podcast

You don't need expensive software or a statistics degree.

You need a few good numbers, tracked consistently, reviewed regularly.

This template gets you started.

## FIND YOUR NORTH STAR METRIC

If you could only track one number—one metric that, if it improved, would mean you're succeeding at your mission—what would it be?

That's your North Star. Everything else supports it or is noise.

### Step 1: Name Your Strategic Priorities

What are you actually trying to accomplish this year? (Limit to three.)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### Step 2: Pick One Metric Per Priority

What single number would tell you if each priority is on track?

Priority	North Star Metric	How You'll Measure
#1		
#2		
#3		

## DEFINE YOUR METRICS CLEARLY

Vague definitions lead to inconsistent tracking. Get specific now so your data actually means something later.

**Complete one of these for each metric you're tracking:**

### METRIC #1

Name: \_\_\_\_\_

Exactly what we're counting: \_\_\_\_\_

Where the data comes from: \_\_\_\_\_

Who updates it: \_\_\_\_\_

How often:  Weekly  Monthly  Quarterly

Current baseline: \_\_\_\_\_

Target: \_\_\_\_\_

### METRIC #2

Name: \_\_\_\_\_

Exactly what we're counting: \_\_\_\_\_

Where the data comes from: \_\_\_\_\_

Who updates it: \_\_\_\_\_

How often:  Weekly  Monthly  Quarterly

Current baseline: \_\_\_\_\_

Target: \_\_\_\_\_

### METRIC #3

Name: \_\_\_\_\_

Exactly what we're counting: \_\_\_\_\_

Where the data comes from: \_\_\_\_\_

Who updates it: \_\_\_\_\_

How often:  Weekly  Monthly  Quarterly

Current baseline: \_\_\_\_\_

Target: \_\_\_\_\_

## BUILD YOUR REVIEW RHYTHM

Data you collect but never look at is worse than useless—it wastes everyone's time. Schedule your reviews now.

### Monthly Data Review (30-45 minutes)

When: \_\_\_\_\_

(Example: First Tuesday of every month, 2:00 PM)

Who leads: \_\_\_\_\_

Who attends: \_\_\_\_\_

### Meeting Agenda

5 min — Wins: What improved? Name it. Celebrate it.

10 min — Review: Walk through each metric. What changed since last month?

10 min — Dig deeper: Pick the most surprising number. Why did that happen?

10 min — Frontline input: What are staff seeing that the numbers don't show?

5 min — Action: What ONE thing will we do differently based on this?

### Questions to Ask Every Time

- Is this moving in the right direction?
- What's the story behind this number?
- Are we comparing apples to apples? (Same definitions over time?)
- What would we need to know to make a decision?
- What action does this suggest?

## VANITY METRICS VS. NORTH STAR METRICS

Vanity metrics look good in reports but don't tell you if you're succeeding. North Star metrics connect directly to mission impact.

VANITY (looks good)	NORTH STAR (means something)
Instagram followers	Donors who found you on social
Website visitors	Website visitors who took action
Number of programs offered	Participant outcomes achieved
People served (raw count)	Program completion rate
Email list size	Email open + click rates
Events held	New donors/volunteers from events
Grants submitted	Grant success rate + dollars won

*The test: If this number improved but nothing else changed, would your mission be better served?*

## SAMPLE METRICS BY ORGANIZATION TYPE

Starting points. Adapt to your mission.

### **Human Services**

- % of clients achieving stated goals
- Housing/job stability at 6 and 12 months
- Program completion rate
- Return rate (lower often = success)

### **Youth Development / Education**

- Academic improvement or maintenance
- Program attendance/engagement rate
- Mentor match duration (if applicable)
- Graduation/advancement rate

### **Arts & Culture**

- Return visitor rate
- Participant skill growth (if teaching)
- Community partnerships active
- Membership retention rate

### **Faith-Based / Ministry**

- Small group/program participation rate
- Volunteer engagement (% of members serving)
- Outreach impact (people served in community)
- New member integration rate

### **Fundraising (All Organizations)**

- Donor retention rate (most important!)
- Donor upgrade rate
- Cost to acquire new donor
- Average gift size by segment

# YOUR 30-DAY START

Don't try to build a comprehensive data system. Start with one metric. Get that right. Expand later.

## WEEK 1: DECIDE

- Review your strategic priorities with your team
- Brainstorm: What data would actually help us make better decisions?
- Select ONE metric to start with (just one!)

## WEEK 2: BUILD

- Write a clear definition (use the template on page 3)
- Set up a simple spreadsheet
- Establish your baseline (where are you now?)
- Assign one person to own updates

## WEEK 3: LAUNCH

- Explain the WHY to your team ("this helps us improve," not "this checks on you")
- Schedule your first monthly data review meeting
- Start collecting
- Check: Any data quality problems showing up?

## WEEK 4: REVIEW

- Hold your first data review meeting (use agenda on page 4)
- Ask: Is this metric telling us what we need to know?
- Identify one action to take based on the data
- Celebrate—you're now data-driven

## NEED MORE SUPPORT?

**Podcast:** Listen to Episode 9 at [missiondrivenpod.com](http://missiondrivenpod.com)

**Blog:** Read the companion post for deeper examples and stories

**Consulting:** Need help identifying metrics, building dashboards, or training your team?  
Contact The Scanland Group at [contact@thescanlandgroup.com](mailto:contact@thescanlandgroup.com) or visit [thescanlandgroup.com](http://thescanlandgroup.com)

*From The Scanland Group:*

*Keep leading with heart, keep showing up with purpose,  
and keep creating a world where everyone belongs.*