



Knowing Where the Bus is Headed

Elevating Wellness Together's Mental Health Counseling Operation Following Rapid Growth with the Use of OKRs



CLIENT

Wellness Together

INDUSTRY

Education Nonprofit

EMPLOYEES

13

Wellness Together (WT) is a Sacramento nonprofit that provides mental health services for K-12 students through collaboration, integration, and a turn-key approach. The Founder and Executive Director, Marlon Morgan, began as a school counselor 20 years ago and quickly realized that providing academic and career guidance left little time to support the mental health needs of his students.

WT understands the importance of delivering effective and collaborative support on campuses to meet the needs of students and families. Born out of the need to answer whether the school system is doing all it can for students, WT delivers invaluable on-site and remote mental health services for all students, regardless of Medicaid or insurance requirements through partnerships with schools.

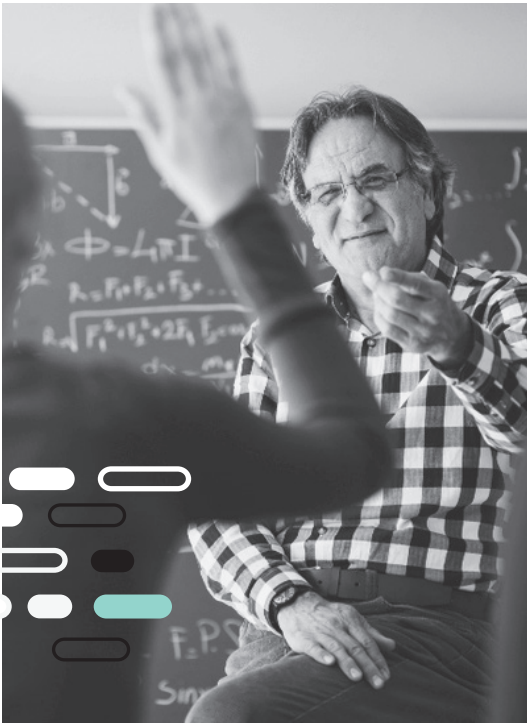
WT has filled a need that school counselors, support staff, school administrators, district leaders, and board members all recognized as lacking, and is critical to the wellbeing of students mental health support.

GROWING PAINS

Because Wellness Together provides such extraordinary services, it experienced a major growth phase that left it reeling, leading to concern for the organization's health as a whole. Group dynamics were strained and there was a lack of trust in the effectiveness. Without regular discussions or reviews, there was no road map to use to execute the big visions.

This hypergrowth in a very short amount of time, in tandem with the pandemic, had caused WT a great deal of pressure about whether they would be able to keep on top of things enough so that the youth it served did not suffer. Already, rollouts of program offerings were continually needing to be pushed farther and farther out.





“Understanding our mission was critical to having alignment and clarity”

Jeremiah Aja
M.A., M.Div., LPCC
Director of Partnerships



Strategic initiatives are difficult to implement in the midst of growth. The tools used to maintain transparency, guide staff, and get everyone to commit to the same mission can begin to break down as work demands and the team grows.

ADDITIONAL CHALLENGES

Objectives & Key Results (OKRs) had become out of sight, out of mind at Wellness Together. Routine check-ins had gone by the wayside. There was a surge in hiring, but the Human Resources department lacked the necessary structure and process to make good staffing choices. There was a critical need to clean house to keep everyone on the same page. Layoffs became necessary across all departments.

To address these issues, WT recognized that their staff needed a sense of safety and protection that was aligned to the organization's core values, along with a scaling structure that could support their rapid growth. It was through transparency, efficient processes, and regular training, that WT was able to begin this process.

With its humble beginnings, the organization had not been able to scale its operations effectively as rapid growth took hold. Additionally, there was apprehension that, while necessary, a more corporate approach to business processes could alter their ethos. It was important for both the staff and the stakeholders to toe the line between corporate efficiency and preserving its culture, warmth and heart.

THE FACTS

The organization was desperately striving to fill in the gaps left by the school system as they approached the end of 2021. The staff was doing excellent work in a time of dire social need, yet Wellness Together knew they had to be more focused on how to make the growth they'd experienced sustainable and manageable moving forward.

WT doubled its school partners in 5 out of the last 6 years

WT doubled its growth year over year - beginning with 100 students, growing to 200, then 400, then 800...

In 2020 WT's growth stagnated but escalated to a new high in the 2020/21 school year

“With our talent and work effort, we were hitting a ceiling. We realized we can’t just work hard – we need these guard rails that Wave Nine helped us establish with OKR, to keep us on track.”

Jeremiah Aja
M.A., M.Div., LPCC
Director of Partnerships



Luckily for WT, they’d chosen a virtual angle for their business model early on, pre-pandemic, which had met with controversy at the time, and wound up being an ideal solution for supporting young people through lockdowns and remote learning.

MOVING FROM CHALLENGES TO SOLUTIONS

Wellness Together found Wave Nine through a WorkBoard demonstration and chose Wave Nine as a partner to facilitate greater alignment and clarity for the company as a whole. Their solution was broken down into enablement and OKR crafting:

SOLUTION & EXECUTION - BUILDING A SCALABLE STRUCTURE THROUGH OKRS

Wave Nine worked closely with Wellness Together’s directors to develop a clear OKR strategy to ensure that everyone within the organization was aligned on the same goals. OKRs were the driving force behind their alignment and worked as a tiebreaker in difficult decision making.

OKR TRAINING

A strong OKR program enables each employee from every department to understand the interconnectivity to the organization’s mission and vision and to hold everyone accountable.

Wave Nine believes in teaching companies the skill set of setting goals and measuring key successes. Doing so tees them up for future success and sustainability, all on their own.

Hence, Wellness Together teamed up with Wave Nine for a 4-hour virtual training on general OKR methodology and a 5-hour on-site workshop to create their organization’s OKRs at the WT offices in Sacramento, CA. These trainings were facilitated by Aria Taddey and Bryan Fregoso. They used their experience implementing OKRs to guide the discussion, helping the staff to understand the value of each type of approach, before settling on one that suits the organization’s needs best.



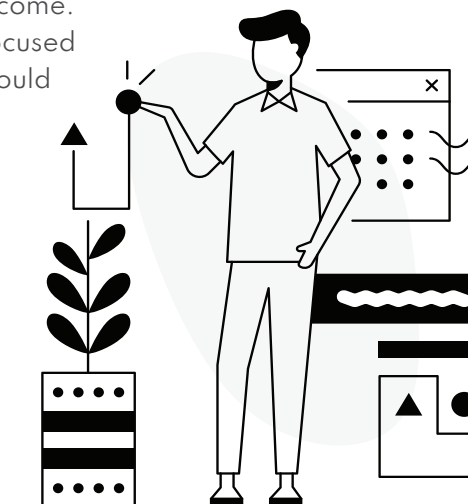


DEFINING THE OKRs

Bryan Fregoso and Aria Taddey facilitated a half-day on-site Executive Leadership Team (ELT) workshop. The discussion began with defining the purpose of the session and to reconfirm that intended outcomes were to have strong OKRs that would provide them with clear direction for their organization. It was important for WT to create a common language to reassure the teams that they are sticking with their mission and values, and that the students remained their number one priority.

Bryan and Aria encouraged the team to embrace radical clarity and take a deeper dive into the main pain points that each member and their team had been facing, and why. They captured common themes across the teams and laid everything out, as each team member recounted their experiences over the last six months. The Wave Nine coaches helped them discover where the origins of their issues were, and how all of it could be focused into categorical themes. This gave them clear direction on where they could align their OKRs towards.

Aria and Bryan combined these themes, along with WT's strategic initiatives, and were able to help them determine what were the best possible near term outcomes, and turn them into measurable key results. While creating the key results, the coaches helped steer the team towards measurements with a strong outcome focus. This helped the teams recognize that their daily work, no matter how big or small, should always connect to their measurable outcomes. This ensured that they avoided the common issue many organizations face of performing numerous tasks without a clearly measurable success metric and instead simply hoping for a good outcome. By setting clearly defined outcome-focused Key Results first, Wellness Together could ensure that teams could also connect all their tasks back to the intended outcome and thus see the fruits of their work. The coaches helped the team come to a consensus that whenever a decision came to a stalemate, their OKRs should be the tiebreaker in their decision making.



GOALS



Create common language



Implement filters to make better decisions



Integration of a digital operating rhythm (Behavior cadence)

Based on in-depth meetings, WT and Wave Nine identified the following, OKRs:

OKR 1 - PEOPLE & CULTURE

OBJECTIVE

All employees have opportunities for continuous learning and a meaningful, long-term career that transforms the future of mental health and a generation for good.

KEY RESULT



Increase annual retention of employees



Increase participation in employee evaluation up from



Increase average rating of employee evaluation



Increase employee engagement with at least one targeted training

OKR 2 - CUSTOMER SERVICE & EXTERNAL PARTNERS

OBJECTIVE

Our excellence in partnerships increases continuity of care and access to student mental health services.

KEY RESULT



Increase pre/post-completion assessment rate



Statistical Process Controls are met



Full participation in the partner satisfaction survey



Partner satisfaction surveys report increases

OKR 3 - SUSTAINABILITY & OPERATIONAL EFFICIENCY

OBJECTIVE

Our teams and workflows are efficient, sustainable, and created to value the people within them, and those we serve.

KEY RESULT



Employees' work life balance satisfaction increases



All employees can recall OKRs



All employees agree with OKRs



All employees understand how their own OKRs relate



Capacity, hiring, and retention



Work/life balance without sacrificing customer service





“After working with Wave Nine to define our OKRs, we now know where the bus is headed and when it will be there. Everyone feels more at ease now that they are after a common goal.”

Jeremiah Aja
M.A., M.Div., LPCC
Director of Partnerships



PROGRAM IMPLEMENTATION & RESULTS ACHIEVED

Six months from its initial implementation, Wellness Together's OKR program provided greater structure and business practices. Directors are now reporting on KR progress on a monthly basis in their director meetings, and the increased structure has improved levels of enthusiasm and drive amongst staff.

Their OKRs have taken teams that were working in silos and experiencing an uneven distribution of duties to cohesive collaboration and equity in task management. Referral teams are now seeing increased resources and rollout progression, which has helped double the number of free counseling sessions for students in schools - totaling an extraordinary 22,000+ sessions!

The work may not be over, but WT is well on its way to greater internal stability and scalability while continuing to provide in-person and online counseling to youth experiencing high levels of trauma, stress, and anxiety in today's climate.

Wave Nine's work with the WT team allowed them to discover their equilibrium while responding to a rapidly growing demand within their field of expertise.

LEARNINGS & TAKE AWAYS

OKRs are locally authored and owned. They are created by the teams themselves which helps them not only have an increase of ownership, but also stay true to their team and organizational culture.

The OKR methodology is a valuable and important tool for any team and organization, especially when teams come under stress and seek guidance. It helps keeps teams keep aligned, avoid work silos, and keeps them focused on outcomes. It is important to remember that establishing OKRs should not be delayed when your teams are struggling, as it is the tool to help teams get back on track with clarity and alignment.

A critical component of the OKR process is establishing a continued routine of updating and discussing your OKRs. The more teams have OKRs in the forefront of the conversation, the higher chance teams will accomplish their goals. The difference in outcomes, is always the difference in attention.



“Like a dimmer switch, Wave Nine’s work has slowly made our operations brighter and brighter, showing what we needed.”

Jeremiah Aja
M.A., M.Div., LPCC
Director of Partnerships

 WellnessTogether.org
School Mental Health

READY TO SEE WHAT WAVE NINE CAN DO FOR YOUR OKR EFFORTS?



Wave Nine is a not-so-typical OKR consultancy firm headquartered in the Silicon Valley, with offices in Germany, the UK, and Australia. We partner with the leading strategy execution platform WorkBoard to make your strategy happen. We help companies unlock their full potential by guiding them to achieve their strategic priorities and drive faster growth. For startups and enterprises that are serious about OKRs, we build the playbooks, templates, and resources that energize teams, clarify strategies, and drive accountability. We execute your program in hands-on workshops and training from the executives to the teams that make it happen. www.wavenine.com