

How OKRs helped Wellness Together **double free counseling for students**

EDUCATION NONPROFIT · 13 EMPLOYEES · OKR CONSULTING

Wellness Together brings mental health services to K-12 students through school partnerships. After years of rapid growth, it worked with Wave Nine to turn hard work into a clear, shared direction.

22K+

free counseling sessions for students, doubled

Monthly

KR progress reviews in director meetings

3

organization-wide OKRs with outcome-focused key results

AT A GLANCE

CLIENT

Wellness Together, a Sacramento nonprofit that provides mental health services for K-12 students through partnerships with schools

INDUSTRY

Education Nonprofit

EMPLOYEES

13

CHALLENGE

Hypergrowth during the pandemic, OKRs that had fallen out of sight, lapsed check-ins, strained teams and program rollouts that kept slipping

SOLUTION

OKR enablement and crafting with Wave Nine: a 4-hour virtual OKR training, a 5-hour on-site leadership workshop, three organization-wide OKRs with outcome-focused key results, and OKRs as the tiebreaker for tough decisions

RESULTS

Twice as many free counseling sessions for students, now 22,000+, monthly KR reporting in director meetings, cohesive collaboration where teams used to work in silos, and more enthusiasm and drive among staff

THE CHALLENGE

GROWING PAINS

Is the school system doing all it can for students?

Wellness Together grew out of that question.

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

Wellness Together understands the importance of delivering effective, collaborative support on campuses to meet the needs of students and families. Through partnerships with schools, it delivers on-site and remote mental health services for all students, regardless of Medicaid or insurance requirements.

Wellness Together fills a need that school counselors, support staff, school administrators, district leaders and board members all recognized: mental health support that is critical to the wellbeing of students.



THE CHALLENGE

GROWTH THAT LEFT THE ORGANIZATION REELING

Because Wellness Together provides such extraordinary services, it went through a major growth phase that left it reeling and raised concerns about the health of the organization as a whole. Group dynamics were strained, and trust in the organization's effectiveness had worn thin. Without regular discussions or reviews, there was no road map for executing the big visions.

This hypergrowth in a very short time, together with the pandemic, put Wellness Together under heavy pressure. Could the team stay on top of things, so the young people it served would not suffer? Rollouts of program offerings already kept being pushed further and further out.

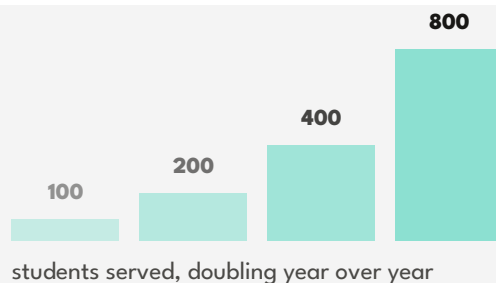
Strategic initiatives are difficult to implement in the middle of growth. The practices that maintain transparency, guide staff and get everyone committed to the same mission can start to break down as work demands rise and the team grows.

The facts

As it approached the end of 2021, the organization was working hard to fill the gaps left by the school system. The staff was doing excellent work at a time of dire social need, and Wellness Together knew it had to focus on making its growth sustainable and manageable.

2x

school partners in five of the last six years



2020/21

a new high, after growth stalled in 2020

Luckily, Wellness Together had chosen a virtual angle for its model early on, before the pandemic. The choice was controversial at the time, and it turned out to be an ideal way to support young people through lockdowns and remote learning.



STRUCTURE THAT COULDN'T KEEP UP

OKRs had become out of sight, out of mind at Wellness Together, and routine check-ins had gone by the wayside. Hiring surged, but the Human Resources department lacked the structure and process to make good staffing choices. A reset became critical to keep everyone on the same page, and layoffs became necessary across all departments.

To address these issues, Wellness Together recognized that its staff needed a sense of safety and protection in line with the organization's core values, along with a structure that could support its rapid growth. It began this work through transparency, efficient processes and regular training.

Given its humble beginnings, the organization hadn't been able to scale its operations as fast as it grew. There was also apprehension that a more corporate approach to business processes, while necessary, could change its ethos. Staff and stakeholders wanted to strike a balance between corporate efficiency and the culture, warmth and heart of the organization.

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

Jeremiah Aja

Director of Partnerships, Wellness Together

Wellness Together faced five challenges at once:

01

Hypergrowth,
together with the
pandemic

02

No road map, and
rollouts that kept
slipping

03

OKRs out of sight,
with lapsed check-
ins

04

Strained group
dynamics and
teams in silos

05

A hiring surge
without HR
structure and
process

“ 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

Director of Partnerships, Wellness Together



THE SOLUTION

A SCALABLE STRUCTURE THROUGH OKRS

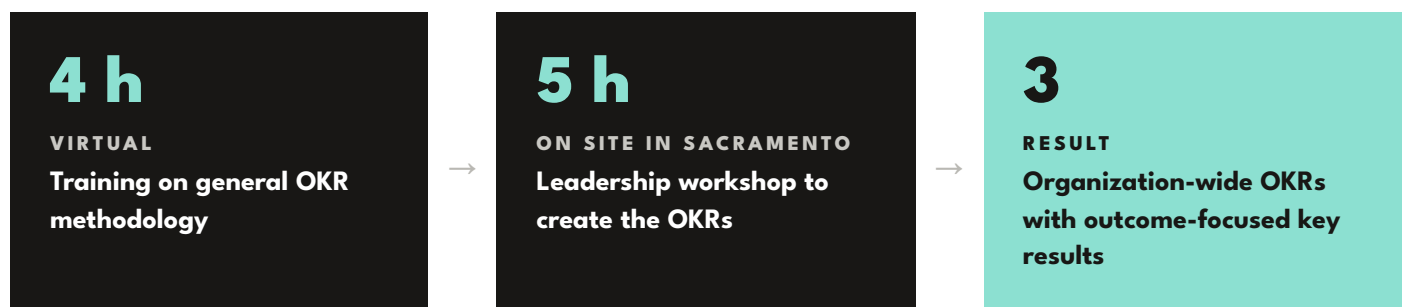
Wellness Together found Wave Nine through a WorkBoard AI demonstration and chose Wave Nine as its partner to create greater alignment and clarity across the organization. The work had two parts: enablement and OKR crafting.

Wave Nine worked closely with Wellness Together's directors on a clear OKR strategy, so everyone in the organization was aligned on the same goals. OKRs became the driving force behind that alignment, and the tiebreaker in difficult decisions.

OKR training

A strong OKR program helps every employee in every department understand how their work connects to the organization's mission and vision, and holds everyone accountable. Wave Nine believes in teaching organizations the skill of setting goals and measuring key successes, so they are set up for future success and sustainability on their own.

Wellness Together started with a 4-hour virtual training on general OKR methodology, followed by a 5-hour on-site workshop at its offices in Sacramento, California, to create the organization's OKRs. Two Wave Nine coaches facilitated both. They drew on their experience implementing OKRs to guide the discussion and help the staff understand the value of each approach, before the team settled on the one that suits the organization best.



DEFINING THE OKRS

The half-day on-site workshop brought together the Executive Leadership Team (ELT). It began by defining the purpose of the session and reconfirming the intended outcome: strong OKRs that give the organization clear direction. Wellness Together wanted a common language that would reassure the teams that they were staying true to their mission and values, and that students remained the number one priority.

The Wave Nine coaches encouraged the team to embrace radical clarity and dig into the main pain points each member and their team had been facing, and why. As each team member recounted their experiences over the last six months, the coaches captured common themes across the teams and laid everything out. Together, they found the origins of the issues and grouped them into themes, which showed clearly where the OKRs should focus.

The coaches combined these themes with Wellness Together's strategic initiatives to determine the best possible near-term outcomes, and turned them into measurable key results. While creating the key results, they steered the team toward measurements with a strong outcome focus. The teams came to see that their daily work, no matter how big or small, should always connect to measurable outcomes. That helped them avoid a common trap: performing numerous tasks without a clear measure of success and simply hoping for a good outcome.

With clearly defined, outcome-focused key results in place first, teams could connect all their tasks back to the intended outcome and see the fruits of their work.

The workshop had three goals:

01

Create a common language

02

Implement filters to make better decisions

03

Integrate a digital operating rhythm (a behavior cadence)

THE DECISION RULE OKRS BREAK THE TIE

The coaches helped the team reach a consensus: whenever a decision comes to a stalemate, the OKRs are the tiebreaker.

WELLNESS TOGETHER'S OKRS

Based on in-depth meetings, Wellness Together and Wave Nine identified three organization-wide 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 RESULTS

- Increase annual retention of employees
- Increase participation in employee evaluation
- 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 RESULTS

- 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

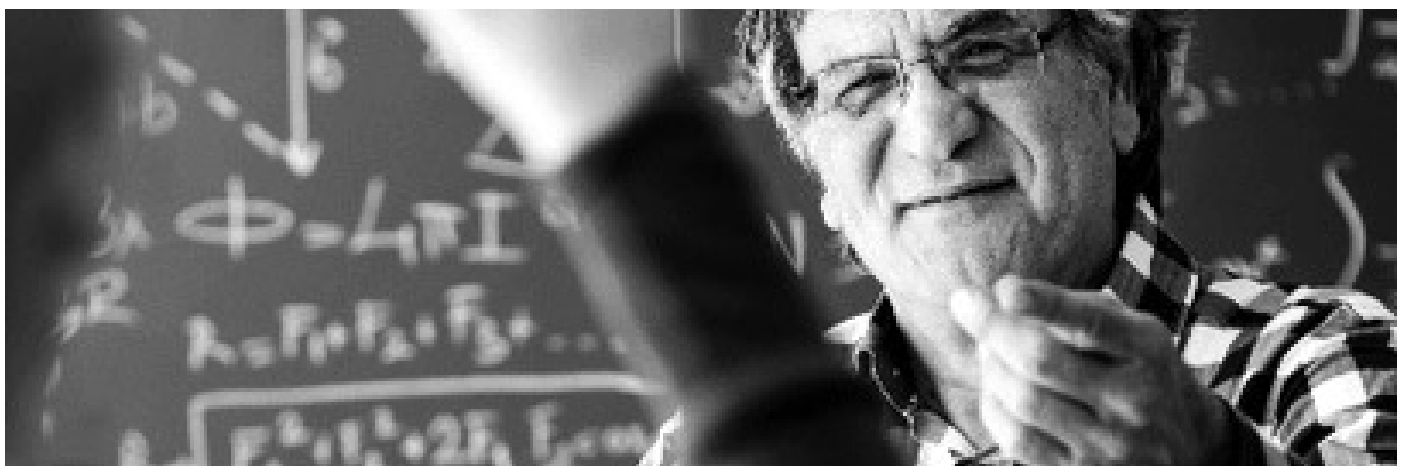
Sustainability & Operational Efficiency

OBJECTIVE

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

KEY RESULTS

- 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



KNOWING WHERE THE BUS IS HEADED

Six months after the initial implementation, Wellness Together's OKR program had brought greater structure and stronger business practices. Directors now report on KR progress every month in their director meetings, and the added structure has raised enthusiasm and drive among staff.

The OKRs have moved teams that worked in silos, with an uneven distribution of duties, to cohesive collaboration and fairness in task management.

22,000+

**FREE COUNSELING SESSIONS,
DOUBLED**

Referral teams now see more resources and steady rollout progress, which has helped double the number of free counseling sessions for students in schools, to an extraordinary 22,000+ sessions.



The work isn't over, and Wellness Together is well on its way to greater internal stability and scalability. It continues to provide in-person and online counseling to young people facing high levels of trauma, stress and anxiety. Wave Nine's work with the team helped Wellness Together find its equilibrium while responding to rapidly growing demand in its field.

“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

Director of Partnerships, Wellness Together

THE RESULTS

THE RESULTS AT A GLANCE

- **22,000+ free counseling sessions:** twice as many sessions for students in schools, as referral teams gained resources and rollouts moved forward.
- **From silos to collaboration:** teams moved to cohesive collaboration and a fair distribution of tasks.
- **A clear tiebreaker:** OKRs guide difficult decisions.
- **Monthly KR reporting:** directors report on key result progress in their monthly director meetings.
- **More energy on the team:** the added structure raised enthusiasm and drive among staff.



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**MONTHS TO GREATER
STRUCTURE**

Six months after the initial implementation, Wellness Together's OKR program had brought greater structure and stronger business practices, with directors reporting on KR progress every month.

LEARNINGS AND TAKEAWAYS

OKRs are locally authored and owned

Teams create their OKRs themselves, which increases ownership and keeps the OKRs true to the team and organizational culture.

OKRs help most under stress

The OKR methodology is valuable for any team and organization, especially when teams come under stress and look for guidance. It keeps teams aligned, avoids work silos and keeps everyone focused on outcomes.

Don't wait to set OKRs

Establishing OKRs shouldn't be delayed when teams are struggling, because OKRs are what helps teams get back on track with clarity and alignment.

Keep OKRs in the conversation

A continued routine of updating and discussing OKRs is critical. The more teams keep OKRs at the forefront of the conversation, the higher their chance of accomplishing 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

Director of Partnerships, Wellness Together

STRATEGY EXECUTION WITH OKRS AND AI

Let's talk about what this could look like in your organization.

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About Wave Nine. Wave Nine are AI and OKR consultants for complex organizations. Founded in Silicon Valley, we have guided 300+ transformations in 30+ countries, trained 50,000+ people and are the No. 1 implementation partner for WorkBoard AI. We help leadership teams turn strategy into results: the right goals, a steady operating rhythm, and AI that the whole organization uses to run the business.

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