





# OKRs in the Social Sector

July 30, 2020

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IMPACT:30


  

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## Mission Matters Group

We believe in the promise of nonprofits and the passion of people to transform communities.

We help harness the power of people, process, and technology to maximize the impact of nonprofits.

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**BLACK  
LIVES  
MATTER**

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## Objective

- ✓ Leaders will walk away with an understanding of the *why*, *what*, and *how* of OKRs – and begin to feel prepared to implement within their own organizations.



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## Logistics

- ✓ Materials will be shared
- ✓ QA at the end
- ✓ Schedule a call to go deeper

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## Agenda

The Why: A look at OKRs from the balcony and dance floor

The What: Overview of the OKR Framework

The How: Keys to Successfully Implementing OKRs

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## Why OKRs? A look from the Balcony

1. Change is accelerating – ability to harness change and remain focused/results oriented is challenging.
2. Collaboration has become more of the norm rather than a competitive advantage.
3. Motivation 3.0 honors the value of autonomy

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## Why OKRs? From the dance floor

a case of the Strategy Flu



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## Why OKRs? From the dance floor

### The Impact of “all strategy”:

- Less focus → less efficient and resourceful
- Difficult to prioritize → work piles up, hard to say no
- Unclear Goals/Desired Outcomes → Success is left a mystery



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Defining success is hard.

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## Why OKRs? From the dance floor

- ✓ Simplifies the process
- ✓ Makes success clear and measurable
- ✓ Clarifies direction and aligns teams
- ✓ Enables autonomy

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## Why OKRs? From the dance floor

### The Impact

- ✓ Builds capacity to tell your story of success and impact
- ✓ Fosters transparency
- ✓ Enables accountability in both process and performance
- ✓ Fuels collaboration

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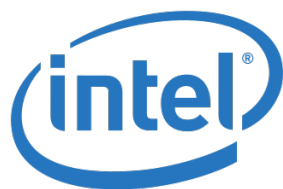
A simple yet meaningful way to *define success*  
and by which *encode focus* in your day to day.

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## The What: Objectives and Key Results

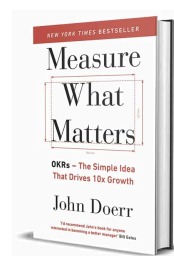
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Andy Grove

John Doerr



[www.whatmatters.com](http://www.whatmatters.com)

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### Objectives

- *what* you want to achieve
- inspirational and aspirational yet actionable and realistic
- memorable

### Key Results

- *how* you will know if you've achieved it
- specific, measurable, binary, meaningful
- essentials only yet must "sum to satisfy the objective"

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Objective:  
Establish financial sustainability for the next 75 years.

### Key Results

- ✓ 8/8 core programs revenues cover I&D expenses (FY22 + FY 23)
- ✓ Grow financial reserves from \$3.7M to \$5.4M by end of FY23.
- ✓ Maintain a current ratio of 2:1 or better in FY21 – FY23.

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Objective:  
Set the national standard for increasing independence and well-being for individuals with developmental disabilities.

Key Results

- ✓ Increase number of clients who enroll in higher Education or career training program from 53% to 85% by end of FY22.
- ✓ Increase the client employment rate for those 22 and older to an industry leading 98%.
- ✓ 95% of adult clients live in their zone of independent living by August FY22.
- ✓ Reduce cost of care by 15% by end of FY21.

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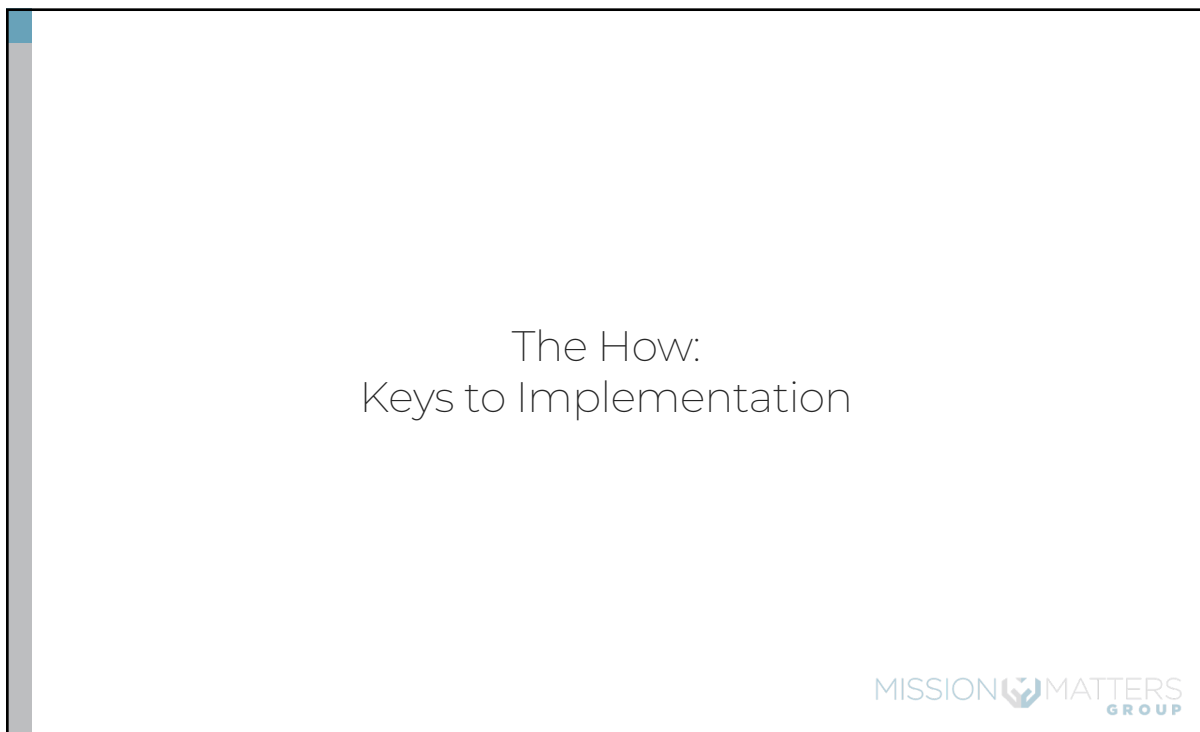
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For nonprofits, OKRs can and should be written for both programmatic outcomes and organizational health and sustainability.

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highly customizable

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### Planning

- Start small. Learn. And manufacture wins.
- Teach the purpose
- Harness the flexibility of OKRs → Do what makes sense for your organization

### Execution

- Expect to struggle.
  - Don't settle.
  - Iterate and refine.
  - Get to *meaningful* and *measurable*.
- Deliberately plan out *how you will know* each KR has been met.
- Tracking and Transparency.
  - Setup “rhythms” to monitor and formally review and retrospective.

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“If you could get all the people in the organization rowing in the same direction, you could dominate any industry, in any market, against any competition, at any time.”

- Patrick Lencioni

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## Stay in Touch

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