ValueOps and OKRs: Enabling a Non-Profit Organization to Track and Realize Value

ValueOps and OKRs:
Enabling a Non-Profit
Organization to Track
and
Realize Value

Winmill PPM
A Division Of Winmill

Step Up
for students

Abstract

Step Up For Students is a non-profit organization that funds scholarships for lower to middle-income families, students with unique abilities, students who have experienced bullying or violence, and students who struggle with reading.

Step Up For Students managed $714 million in scholarship funding in 2019 and awarded scholarships to more than 150,000 students in 2020-2021. The number of scholarship students served grew to more that 250,000 in 2022-2023. With such dramatic growth, their IT department was facing challenges managing projects and programs in a more efficient and sustainable way.

They evaluated a number of project, portfolio, and resource management applications and found that most lacked a native way to manage Objective and Key Results (OKRs) in a meaningful way.

Step Up For Students partnered with Winmill PPM and Broadcom to implement Clarity, a value stream management application, and an OKR solution. The OKR solution was tweaked to incorporate Imperatives, and new portlets were designed allowing Step Up For Students to track and visualize results in a way that was meaningful to their leadership and manageable for their project managers.

The Organization

"Transforming our community, one scholarship at a time." This is the heart and soul of what Step Up For Students does.

They are a non-profit organization that funds scholarships for lower to middle-income families, students with unique abilities, students who have experienced bullying or violence, and students who struggle with reading.

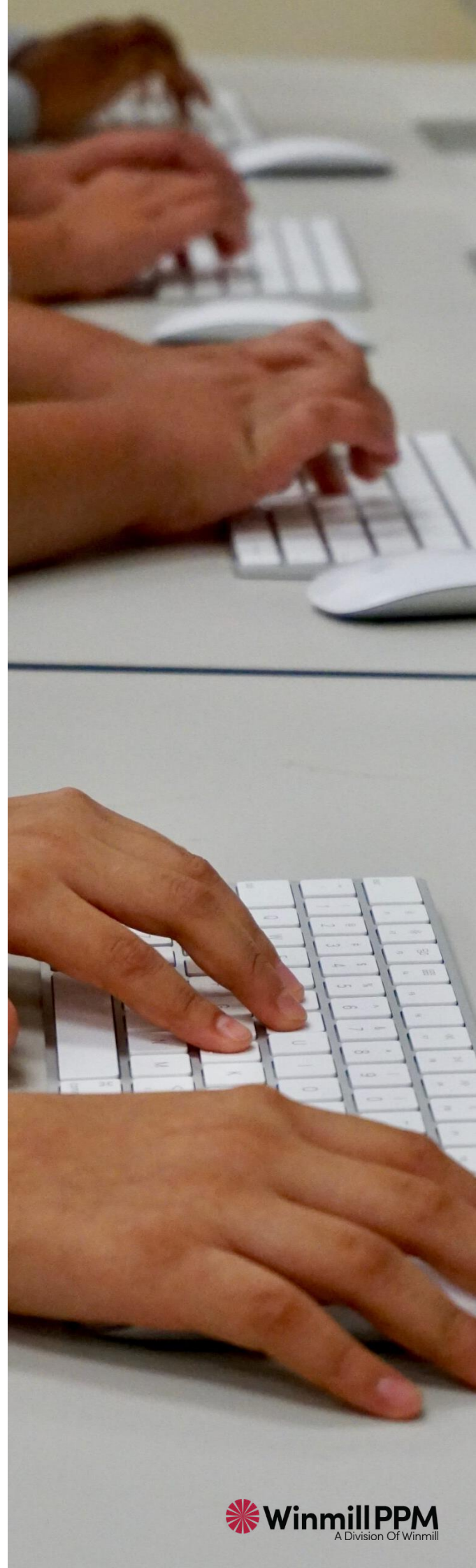Step Up For Students is a partner of public schools, giving students the tools, they need to succeed.

Empowering parents through scholarship programs, allowing them to discover educational options that work best for their children.

Step Up For Students managed $714 million in scholarship funding in 2019 and awarded scholarships to more that 150,000 students in 2020-2021. over 250,000 student scholarships have been served in 2022-2023

Step Up For Students has granted more than 1 million scholarships since their founding in 2001.

Winmill PPM
A Division Of Winmill

The Problem

Step Up has come a long way since the Florida Tax Credit Scholarship Program was created in 2001 and served 15,000 low-income students across Florida in its 2002-03 inaugural year, since then over 1 million scholarships have been awarded. That level of growth doesn't come without some growing pains.

While it is obvious the organization was doing fantastic work, the IT department needed to find a way to manage its projects and programs in a more efficient and sustainable way as the organization scaled to support its growth.

The IT department was using Microsoft Project to manage their project plans and Excel was used to manage project financials. The also utilized a strategy execution platform which was not very user friendly and did not provide a holistic picture of their strategy.

Gathering data and presenting it in a meaningful way that would allow them to make decisions required a lot of manual effort.

Countless hours were spent performing tasks just to get the information into a format that would enable their leadership team to make sound investment decisions.

Resource management was equally as challenging with the tools Step Up For Students had available to them.

They knew there had to be a better way to achieve their goals in a more efficient and reliable manner.

In addition to improving efficiency, they wanted to enable the organization to map the work they are doing to the organization's Objectives and measure progress using Key Results.

Step Up For Students began the process of evaluating project and portfolio management and value stream management applications.

> " It is very difficult to find information and we are unable to easily and effectively visualize our OKR hierarchy which limits our perspective greatly. Furthermore, it and many other strategic platforms do not connect OKRs to projects or other smaller pieces of work.
>
> — *Craig Gonsalves, Vice President, Enterprise PMO*

Winmill PPM
A Division Of Winmill

Why ValueOps?

Step Up For Students' tasked Craig Gonsalves, Vice President, Enterprise PMO with finding the right solution to move the organization to the next level.

They evaluated a number of products and vendors, finding that most had some form of project, portfolio, and resource management capabilities, all with their strengths and weaknesses.

What every product on the market was lacking was a native way to manage Objective and Key Results (OKRs) in a meaningful way. They knew they needed a product with the flexibility to add this capability, and it needed to be delivered in a Low Code/ No Code manner.

When speaking with Winmill PPM about Broadcom's ValueOps solutions, Clarity checked nearly every box on their wish list, with the exception of a native OKR solution.

Winmill PPM was confident that Clarity was the best solution for Step Up For Students and demonstrated how OKRs could be implemented within Clarity, and with that, Step Up For Students, and Winmill PPM partnered to begin their journey to the next level.

> **"**
> During the [Clarity] demos, it became clear that the flexibility of Clarity would allow us to customize and extend its capability to effectively connect "Objectives to Outcomes" and allow us to gain a full perspective of our strategic execution.
>
> *– Craig Gonsalves, Vice President, Enterprise PMO*

Winmill PPM
A Division Of Winmill

Our OKR Solution

Winmill PPM's QuickStart Implementation package was selected to implement Clarity at Step Up For Students. This involved implementing Project Management, which included financial management, status reporting, and risk and issue management. Along with Resource Management, Road mapping, Hierarchies, and more. When it came time to implement OKRs, there wasn't an Out-of-the-Box module, so Winmill PPM partnered with Broadcom to implement a solution.

Broadcom developed an OKR solution within their ValueOps products that can be implemented, but it wasn't exactly what Step Up For Students needed. The OKR solution was tweaked together, incorporating Imperatives into the Objectives and Key Results framework, allowing Step Up For Students to track and measure results in a meaningful way for their leadership and manageable for their project managers. The solution also enables Step Up For Students to manage risks at the project, Objective and Key Result level as well as roll up the financial information, allowing them to analyze cost by defined Imperatives.

The Results

Step Up For Students sees tremendous potential in their ability to manage their projects and build meaningful roadmaps to ensure that they are investing their precious time and money into the work that delivers the most value, not just to their organization but also to the students they support. Every project they consider is mapped to a Key Result. These Key Results then roll-up to an Objective and an Imperative that has been established by their leadership to ensure that the work they are doing is directly tied to the goals of the organization.

Project Managers can quickly see how the work they are delivering is driving value to the organization. The metrics tied to their OKRs easily shows the progress they are making. A series of reports were built that allow Step Up For Students to measure processes, track outcomes, assess risks, and remediate issues. All of this information is readily available with the click of a button. No more tracking down managers to get up-to-date data. Time is now spent delivering value, not compiling reports.

> Winmill PPM have been the conduit to our digital transformation success in this space. Their approach, patience and expertise have shined, as they expertly guided us through our launch. Their cautious approach and thoughtful design of the system provide a testament to the professionalism, experience, and the work they do. I am so glad they are our partners.
>
> *— Craig Gonsalves, Vice President, Enterprise PMO*

Winmill PPM
A Division Of Winmill

Thank you

Winmill PPM
A Division Of Winmill

Step Up
for students