

EXPANDING THE OKR FRAMEWORK IN THE DIVISION OF STUDENT AFFAIRS

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EXECUTIVE SUMMARY

EXPANDING THE OKR FRAMEWORK IN THE DIVISION OF STUDENT AFFAIRS (SUMMARY PAGE 1 OF 2)



When our students set out to discover their path to the top toward a Southern Miss graduation, we know what our students will need along the way. Our desire to help students reach this goal drives us to carry out our mission of developing healthy, connected, and learning-focused students and communities.

We also know that more students today than ever before stand to benefit from our programs, services, physical spaces, and relationships. Effective assessment and strategic planning are among the practices necessary to improve and expand our effect on Southern Miss students.

SACSCOC requires that universities provide evidence showing the use of program and service assessment. Minimum standards are increasing as the accreditation body believes it's important that this process

“Goals at this level and duration are important, but they have life only when segmented into smaller actions and assigned to team members.”

legitimately benefits students. Moreover, strategic planning efforts also require goal setting, result analysis, and documentation if expected to be effective.

Historically, our assessment documentation process has been department-centric with a focus on longer-term goals. Goals at this level and duration are important, but they have life only when segmented into smaller actions and involve team members directly. When assessment is a recurring expectation of all, everyone's output improves.

The Student Affairs Leadership Team (SALT) recognized these opportunities for improvement

and approved a plan early Spring 2020 that is designed to:

1. Meet accreditation requirements with adequately documented evidence,
2. Challenge more staff members to improve operations and programs, and
3. Enhance our reach and effect on Southern Miss students

The following pages detail this plan and provide training for expanding the OKR framework in your respective departments.

EXECUTIVE SUMMARY

EXPANDING THE OKR FRAMEWORK IN THE DIVISION OF STUDENT AFFAIRS (SUMMARY PAGE 2 OF 2)



“Effective assessment requires that we ‘Close the Loop.’ We open loops by submitting OKRs after we set new goals. We close loops when we submit follow-up OKRs reporting observed results, an analysis, and next steps.”

Assistant, associate, and full directors and their supervisors will complete a minimum of two OKRs each semester. Coordinators and managers may participate in this process as well.

Effective assessment requires that we “Close the Loop.” We open loops by submitting OKRs after we set new goals. We close loops when we submit follow-up OKRs reporting observed results, an analysis, and next steps. Participating staff members and

supervisors may use the [OKR Guide](#) when meeting to brainstorm, coordinate, and approve their OKRs.

Effective coaching will facilitate the creation of meaningful and mission-focused OKRs. While some OKRs may be best set as a directive, those written with both the supervisor’s and employee’s input will more likely generate needed buy-in and commitment. OKRs may focus on the assessment of individual workshops or events, internal organizational processes,

monthly revenue goals, strategic initiatives, etc. Timelines are as flexible as needed and may even be as short as a few weeks.

OKR managers will have the option to attend training sessions or access on-call consultations. As team members become more familiar with this process, the better positioned we’ll become to ensure Southern Miss students benefit from our efforts.

Follow-through is everything. As data for each OKR become available, managers must submit their results, analysis, and decisions within two weeks. Complete submissions effectively close the loop while also setting the stage for another set of newly imagined OKRs. ■

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IMPROVING OUR SYSTEM

IMPROVING OUR SYSTEM

WHAT'S THE PROBLEM?



- More students than ever before stand to benefit from our relationships, programs, and services.
- SACSCOC make their requirements clear—Accredited institutions must learn as much from failures as we learn from successes.
- Relying on annual goals only inhibit timely, actionable assessment practices.
- Previous assessment protocols did not adequately engage all necessary staff members in the process.

IMPROVING OUR SYSTEM

MOVING TOWARD A SOLUTION



- All assistant/associate directors, directors, and SALT members have roles in this OKR project. Leadership may involve additional staff members as needed.
- Supervisors should coach their direct reports through the OKR Guide to set strategic goals.
- Participants must close the loop on at least two OKRs each semester.
- We open loops by setting goals and submitting OKR Forms (see submission links in Appendix).
- We close loops by making a second OKR submission which includes actual results, an analysis, and a description of the followthrough decision. Submit these OKRs soon after the data becomes available.
- On-call assessment consultations are available to all DSA staff.

THE ANATOMY OF AN OKR

THE ANATOMY OF AN OKR

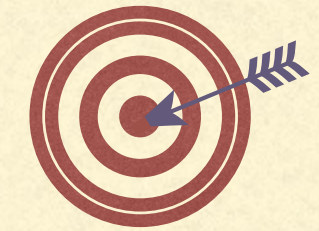
BREAKING IT DOWN

OBJECTIVES



- The staff member's main goal
- Contributes to organization strategy
- Consequential
- Likely necessitates frequent updates (supervisor, team)
- May be operational, programmatic, or learning-focused

KEY RESULTS



- Together define when objective is achieved
- All the qualities of SMART goals ([link](#))
- Bold but achievable
- May be process- and quality-focused (good vs. best)
- Relies on valid and reliable measurements
- Programmatic, Operational, or Learning-Focused ([learn more](#))

USING OKRs LIKE AN EXECUTIVE

EXAMPLE OKRs



Solidify Southern Miss Connections

OBJECTIVE

Galvanize students' connections to Southern Miss.

KEY RESULT

Increase Fall to Fall freshman cohort retention rate to 80%.

USING OKRs LIKE AN EXECUTIVE

EXAMPLE OKRs



Encourage Healthy Living

Expand the use of healthy living practices among our campus-resident population.

Increase the percentage of students reporting ≥ 6.5 hours of sleep each night by at least 20% compared to the previous fall.

Less than 15% of campus residents will require alcohol-related conduct proceedings by the beginning of Fall 2020 week 8.

At least 50% of campus residents will use Payne Center programs or services at least twice by the Fall 2020 week eight.

Increase the number of students reporting they are physically active (i.e., ≥ 30 minutes at least 3 times a week) by 20%.

“They say that nobody is perfect. Then they tell you practice makes perfect.
I wish they'd make up their minds.”

—*Winston Churchill*

USING OKRS LIKE A PRO

USING OKRs LIKE A PRO COACH STAFF TOWARD SUCCESS



- Ensure team members write meaningful, important, and mission-focused objectives.
- Establish smart Key Results.
 - Key Results may be operational, programmatic, or learning-focused ([learn more](#)).
 - Discuss the method of measurement and timeline. Where and when will the data come from? In what form?
 - Objectives are 'achieved' when well-written Key Results are met.
- Help team members exploit their strengths as they progress toward their objective.
- Inquire about progress *privately* to provide feedback, *publicly* to inform team members, and *regularly* to elevate importance.
- Celebrate the successes, build from the failures, open a new loop by submitting a new OKR.

USING OKRs LIKE A PRO

THE ACTION PLAN



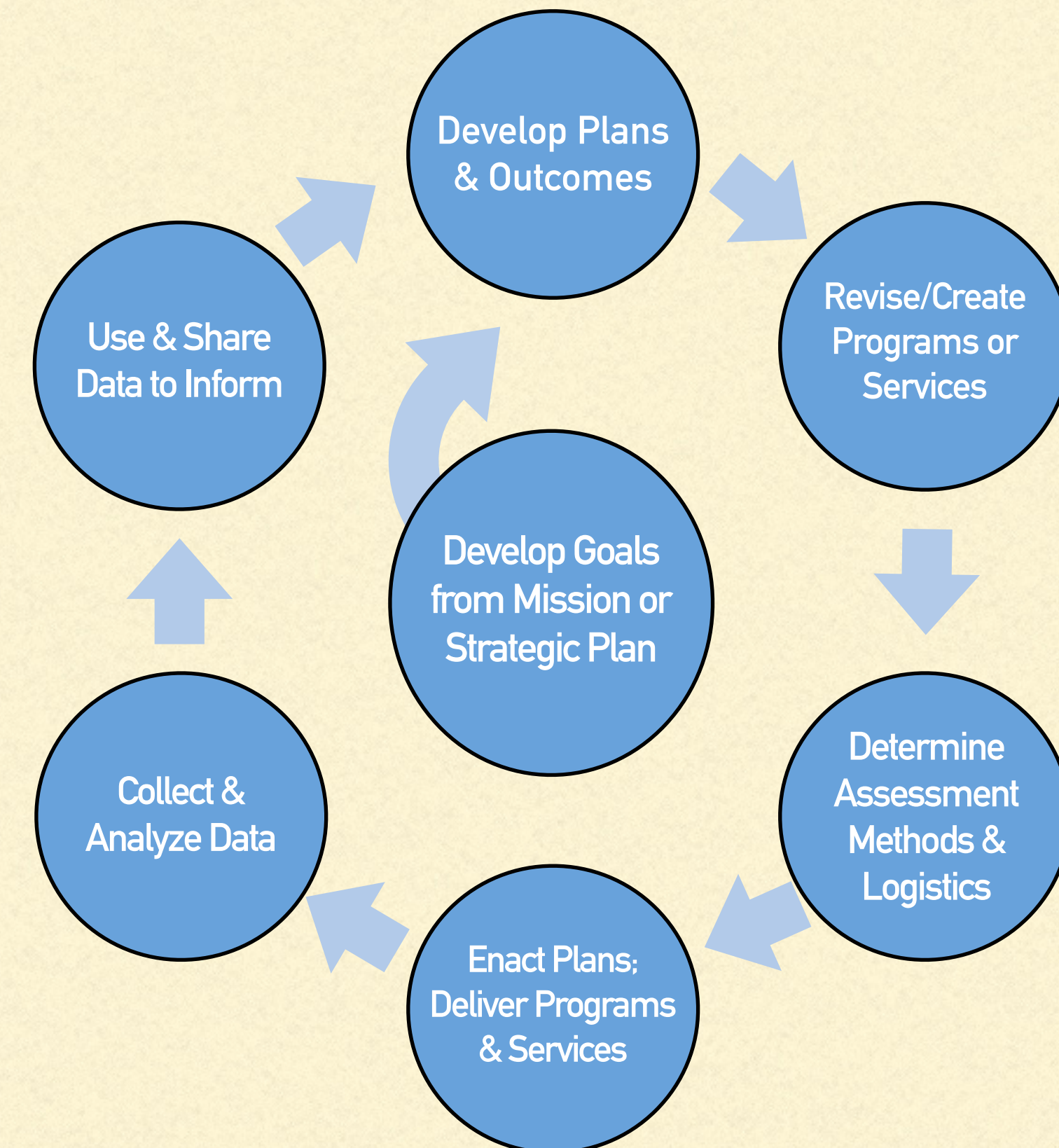
- Get team members started on the best path forward.
- An OKR without a plan of action is at best wishful thinking and at worse wasted time.
- Good OKR action plans require only the detail needed to inform DSA colleagues and partners. They'll need context and relevant detail, but not minutia.
- Some team members may need help getting started with a project. Use the action plan section to sketch out the initial steps.

USING OKRs LIKE A PRO

CLOSING THE LOOP

- Within two-weeks after data becomes available, submit a Closing the Loop OKR ([submission link](#))
- Three Parts:
 1. The Data: Provide a description of the observed data.
 2. The Analysis: What does this data mean? Was the KR achieved?
 3. The followthrough: How will you respond? What did you learn?

The Assessment Cycle



Loop Management: We open assessment loops by developing or revising plans and outcomes (i.e., OKRs). We close assessment loops by measuring, analyzing, and learning from the OKRs we complete.

MAKING IT ALL WORTHWHILE

MAKING IT ALL WORTHWHILE

CROWDSOURCE SUPPORT



- OKRs will be made available to our DSA teammates and partners.
- DSA staff will be encouraged to review each other's objectives and explore collaborative opportunities where fitting.
- When made available to the rest of the division, OKRs propagate interest and support for your goal individual and departmental goals.

MAKING IT ALL WORTHWHILE

CASCADE OKRs TO UNITE TEAMS

- Cascading OKRs (an optional use):
 - Begin with high-level, broad organizational goals that get more specific when interpreted by frontline operations.
 - Occur when a staff member's OKRs are written to directly contribute to their supervisor's stated key results.
 - Promotes strategic synergy by linking the work of departments and individual team members across departments though broad divisional goals.



THE APPENDIX

THE APPENDIX

DETAILING THE OKR GUIDE

Download The Guide



Enter the actual key results.

What do these results mean?

What decisions were made?

What's this for?
The OKR Guide is a helpful tool for sketching out new OKRs. After approved by your supervisor, make it official by submitting your OKR online.

Student Affairs Objectives and Key Results Guide Sheet
Draft your OKRs with the guide sheet, then submit using links on final page.

Objectives and Desired Key Results

1. Responsible Team Member(s):
2. Strategic Goal Focus: Health - Connections - Learning - Operations
3. The Objective: (concrete and action-oriented; may be operational, programmatic, or learning-focused)
4. The Key Results: (think SMART; achieved KR = achieved objective)
KR1:
KR2:
KR3:
KR4:
5. The Action Plan: What steps are required to achieve the objective? Who are the team members?

Results and Closing the Loop

6. Results
Key Result 1:
Key Result 2:
Key Result 3:
Key Result 4:
7. Analyses [Was the outcome achieved? What was learned? Provide a narrative.]
8. What decisions, plans, or initiatives resulted from this assessment?

Consultations: contact Michael L. King
601-266-5516 or m.l.king@usm.edu

Who's managing this OKR?

What's the DSA Focus?

What's the objective statement?

Describe the action plan.

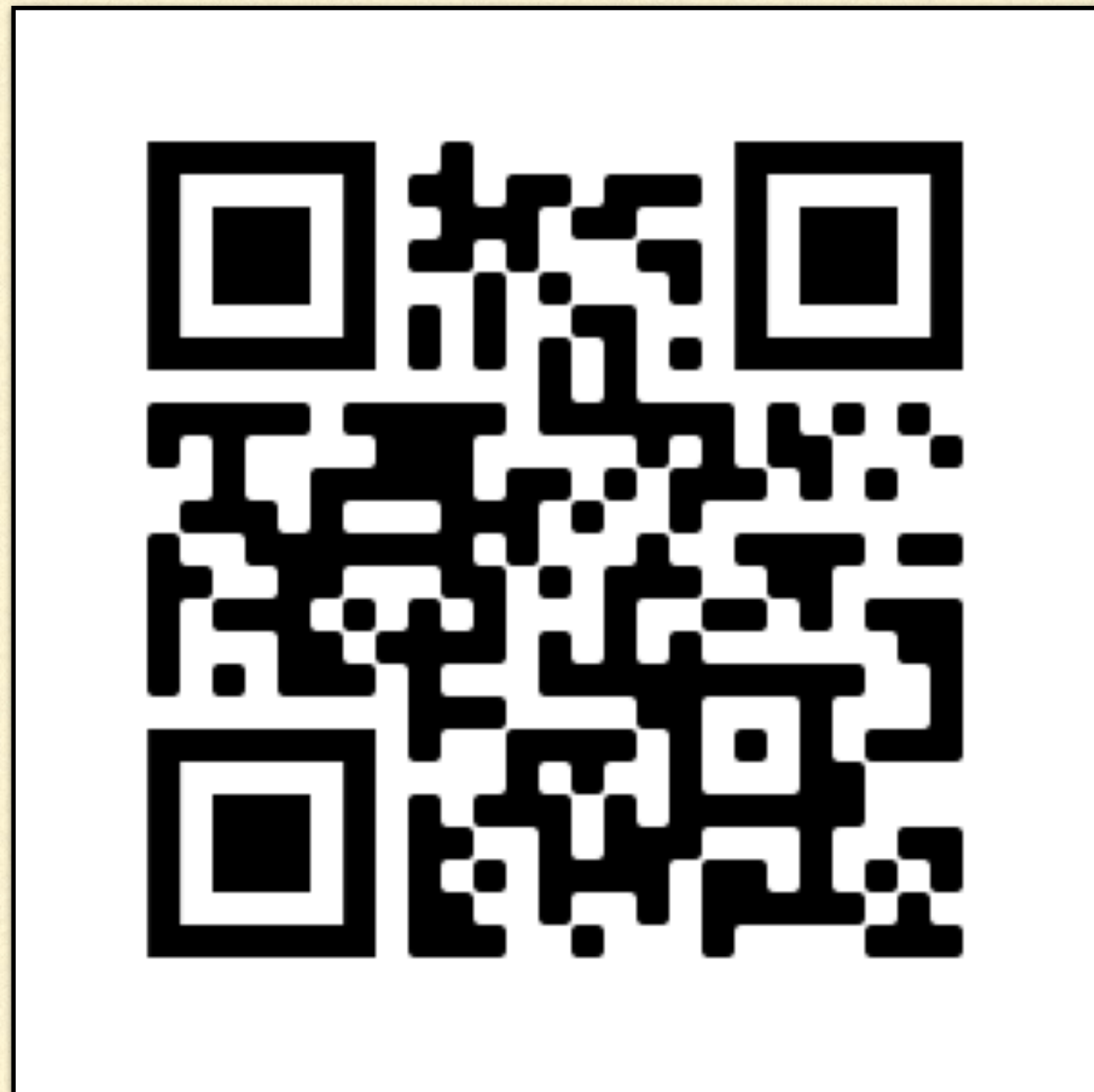
List those proposed key results!

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SUBMISSION LINKS



Loop-Opening OKRs



<https://bit.ly/2XvIVmc>

Loop-Closing OKRs



<https://bit.ly/30t7mCw>

THE APPENDIX

KEY RESULTS ARE OUTCOME STATEMENTS



- **OPERATIONAL Key Results** describe how well the operational aspects of a program or activity are functioning. They help assess buildings, budgets, attendance, number of programs, satisfaction, wait times, etc.
- **PROGRAMMATIC Key Results** establish the desired overall impact of a program, service, or intervention. They track broad effects on campus communities for important metrics such as retention and graduation rates, GPA, drinking or STI rates, campus affinity, etc.
- **LEARNING Key Results** detail the knowledge, skills, and/or traits students should gain or enhance as a result of their engagement with programs, services, or activities. They assess dimensions of AAC&U's and CAS's Essential Student Learning Outcomes.

- Henning and Roberts, 2018

THE APPENDIX

REFERENCES



- John Doerr's Ted Talk, (2018).
- John Doerr's book, Measure What Matters, (2018).
- Gaven Henning and Darby Roberts' book, Student Affairs Assessment: Theory to Practice,p (2016).