



FACILITATION GUIDE | MID-YEAR ORGANIZATIONAL (ORG.) OBJECTIVES PROGRESS BREAKOUT

70 minutes

Facilitation Approach: Structured Sensemaking

Purpose

Engage in cross-functional discussions to build shared understanding of progress toward our FY26 organizational objectives by identifying enablers and challenges, exploring tensions that shape progress or create bottlenecks, surfacing emerging priorities, and examining interdependencies to strengthen alignment and cross-team collaboration.

Breakout Goals

- Build a shared understanding of progress toward organizational objectives.
- Surface the structures, processes, and interdependencies that shape how work happens.
- Identify priority areas and interdependencies for the next quarter.
- Strengthen accountability for advancing the organizational objectives.

Reflection Prompt

Reflect on your team’s OKR progress this fiscal year. In what ways are you confident your team has contributed to advancing our organizational objectives, and where might your team’s progress not have gone as expected? What processes, communication, pacing, or supports have most helped your team make progress in your OKRs? What is one insight or idea from your team’s work that could help strengthen progress toward our organizational objectives across the organization?

Materials

- FY26 OKR Progress Summary handout
- Chart Paper and Markers

Facilitation Flow	Facilitation Notes
<p>Overview 5 minutes</p> <p><i>Provide grounding and instructions for the breakout</i></p>	<p>Remind the group that this breakout is an opportunity to understand our progress in advancing our organizational objectives. This is a learning conversation, not an evaluation of individuals or teams. We’re here to learn together so we can strengthen how individual, team, and organizational accountability work together to advance our work.</p> <p>Together, the group will reflect on team-specific contributions to the organizational objectives, explore tensions that contribute to progress or bottlenecks, surface priorities for Q3, and discuss interdependencies to better align efforts and strengthen the cross-team collaboration needed to advance our objectives.</p> <p><i>“To be effective, top teams must learn to simultaneously manage a number of competing priorities, as well as the tensions that each trade-off creates.” -</i></p>

	<p>– Abramowicz, I., Hinds, J., Lange, D. (2014). <i>Igniting High Performance: How Top Teams Navigate Four Essential Tensions</i>.</p> <p>While tension often can be (and is) viewed as something negative, it is one of the many complexities we deal with and an essential element of innovation and change.</p> <p>Tension Definitions:</p> <ul style="list-style-type: none"> • “Balanced relationship between strongly opposing elements” http://www.freedictionary.com • “The energy generated by a system as it navigates and negotiates differences. As tension of difference builds over time, system conditions shift to relieve that tension, leading to system change. Some changes damage or stunt the system’s growth or productivity. Other system changes can release positive, productive energy and propel the system into higher levels of functioning.” - Human Systems Dynamic Institute
<p>Grounding in Progress (“What?”) 25 minutes</p> <p><i>Build a shared understanding of progress by grounding the group in both organizational OKR data and team-level experiences.</i></p>	<hr/> <p>Part 1 Review Mid-Year OKR Progress Summary (5 minutes)</p> <hr/> <p><i>Facilitator Note(s): Participants have already individually reflected on team OKR progress during their pre-work. Now they will silently review the OKR Progress Summary Handout and reflect on KR status for each organizational objective.</i></p> <p>Reflection Questions:</p> <ul style="list-style-type: none"> • What observations do you have of where we have been successful and/or challenged in achieving our OKRs? • Does anything stand out or surprise you? <hr/> <p>Part 2 Individual Sharing (10 minutes)</p> <hr/> <p>Process: Using round-robin or popcorn sharing, each participant briefly shares one observation from their team’s experience. Encourage participants to listen for patterns, variations, and/or shared experiences.</p> <ul style="list-style-type: none"> • What did your team experience that feels important for others to know? • What has most helped or hindered your team’s OKR progress? (e.g., processes, project management, communication, pacing, supports) <hr/> <p>Part 3 Group Sharing (10 minutes)</p> <hr/> <p>Process: As a group, respond to the discussion questions by drawing on individual observations and the insights and experiences shared in the conversation, using round-robin or popcorn sharing. Responses should be captured on chart paper.</p> <ul style="list-style-type: none"> • What are our observations of where we have been successful and/or challenged in achieving our YTD OKRs? • What has sped us up and/or slowed us down in achieving our intended outcomes? • How have (or could have) equity, efficiency, and effectiveness shown up?
<p>Collaborative Sensemaking (“So What?”)</p>	<p>Group members will build shared understanding about the dynamics that shape our collective work, so we can strengthen how we work together. The</p>

<p><i>20 minutes</i></p> <p><i>Surface and explore the dynamics that shape (enable or constrain) how collective work moves within and across teams.</i></p>	<p>discussion will explore patterns, tensions, and the structures, processes, and interdependencies that influence progress.</p> <p>Facilitator notes: Encourage specificity rather than generalization to help the group differentiate between individual experiences and broader themes. Capture key phrases on chart paper or a shared document.</p> <p>Process: As a group, discuss and capture responses to the following questions:</p> <ul style="list-style-type: none"> ● What tensions are we navigating that are helping or hindering progress? ● What structures, processes, and/or interdependencies might be contributing to these tensions? (e.g., communication, alignment/misalignment, role clarity, etc.) ● What patterns are we seeing, and what variations across teams are we noticing? ● What insights are emerging about what helps us move forward and what slows us down?
<p>Forward Momentum (“Now What?” Part 1) <i>15 minutes</i></p> <p><i>Discuss actionable strategies for working together effectively within and across teams.</i></p>	<p>Group members will surface ideas, conditions, and possibilities that can strengthen how we work within and across teams to advance organizational objectives. This conversation is intended to incorporate insights from earlier in the discussion and provide insights for taking into team-level planning.</p> <p>Guiding Questions:</p> <ul style="list-style-type: none"> ● What enablers would help us collaborate more effectively to move our objectives forward? ● What should we start, stop, or continue doing to advance our shared work? ● What questions, concerns, or uncertainties should be further explored? <p>Process:</p> <ul style="list-style-type: none"> ● Allow group members a couple of minutes to jot down 2–3 potential projects or tactics. ● Through round-robin or popcorning, provide an opportunity for each group member/team to share. ● Capture insights on a flip chart or shared document to visually map connections for the group and for the all-staff Gallery Walk. <ul style="list-style-type: none"> ○ Chart 2: "Enablers" ○ Chart 3: "Start, Stop, Continue" ○ Chart 4: "Wonderings"
<p>Wrap-up/Closing <i>5 minutes</i></p> <p><i>Conclude the breakout by reflecting on and identifying actionable insights.</i></p>	<p>Group members will reflect on the key takeaways from the discussion and identify the insights they want to bring back to their teams to inform core team planning and collaboration moving forward.</p> <p>Provide each group member with a minute to jot down their reflections to the following questions:</p>

- What takeaways will you share with your team to support your team's Q3 planning?
- What takeaways will you apply in your work?

Invite a few group members to share any of their final reflections. It can be either a take-away for their team or personal commitment.

Thank the group for their thoughtful contributions to the discussion. Acknowledge that the insights gained highlight opportunities for better alignment and enhanced collaboration. The intent is that we will be able to function as a more high-performing and unified team as we work toward achieving our FY26 org. objectives.