



FACILITATION GUIDE | WAYS OF WORKING: DATA AND KNOWLEDGE MANAGEMENT PRACTICES

60 minutes

Facilitation Approach: Structured Sensemaking

A facilitated, question-driven sensemaking conversation designed to surface how work actually happens in practice, where it diverges from intended systems and norms, and what that means for collaboration, shared knowledge, and stewardship of organizational records over time. This approach prioritizes honest reflection, pattern-spotting, and collective learning, not compliance, problem-solving or judgement.

Purpose

This breakout explores how our everyday ways of working help or hinder collaboration and shared knowledge, surfaces tensions between individual convenience and stewardship of shared and institutional knowledge, and identifies insights to strengthen data and knowledge management norms and practices.

Breakout Goals

- Explore how our ways of working help or hinder collaboration and shared knowledge.
- Surface tensions between individual convenience and stewardship of shared and institutional knowledge.
- Identify insights to strengthen data and knowledge management norms and practices.

Pre-Work

- Review the Data Retention and Deletion Policy including appendix

Materials

- Facilitator Notetaking Guide

Facilitation Flow	Facilitation Notes
Grounding and Overview 5 minutes	<i>With the full group prior to getting into breakout groups.</i> Purpose of today's discussion: <ul style="list-style-type: none">• Surface insights, barriers, and questions across the organization• Inform upcoming Legal and IT conversations with teams• Shape broader data and knowledge management norms and practices in FY27• Focus on noticing patterns and themes not judging
Breakout Groups 55 minutes	Facilitation Note(s): <i>The group should discuss these questions sequentially because they build one another. It is important to focus on what is actually happening and not what should happen. This conversation is about understanding and not judging compliance.</i>

	<p>Notetaker Guidance: Focus on capturing experiences (e.g., tensions, tradeoffs, challenges) participants describe from their day-to-day work that come up as they individually manage data and knowledge and collaborate with others. Noting what people name as having historical value, as well as the supports they say would help, will help inform where clearer norms, tools, and guidance may be needed.</p> <hr/> <p>Part 1 Grounding in Reality (50 minutes)</p> <hr/> <p>Listen-Fors</p> <ul style="list-style-type: none"> • Common patterns for workaround or tension • Repeated reasons why people choose convenience • System misalignments that are structural, not individual. <p>Guiding Questions:</p> <ul style="list-style-type: none"> • Where do you notice inconsistencies between how work actually happens and how our systems are intended to be used? • Where do you notice work or information staying in personal (“Me”) spaces that might more appropriately live in shared spaces that support our collaboration and retention practices? • Where do you experience tension between individual convenience and org. data and knowledge stewardship? • When you think about records reflecting historical value or impact, what data and information do you work with that feel essential for the organization to understand its work and impact over time? • What examples of support (e.g., training, shared norms, tools, expectations) would make it easier for people and teams to adopt data and knowledge management practices consistently across the organization? <hr/> <p>Part 2 Prepare for Full-Group Sharing (5 minutes)</p> <hr/> <ul style="list-style-type: none"> • What are one or two insights that feel most important for the whole organization to be aware of? • What is one question, tension, or insight that you believe is important for us to collectively hold as an organization as we move into FY27? <p><i>Facilitation Note(s): Close the discussion by thanking the group for being transparent and honest/vulnerable in their sharing. Remind the group that these insights will continue to inform the ongoing work around data and knowledge management norms and practices. Legal and IT will be having more conversations with individual teams around data retention specifically.</i></p>
<p>Full-group Reflection</p>	<ul style="list-style-type: none"> • Across the conversations you just had, what themes or insights feel most important for the whole organization to be aware of? • What is one question, tension, or insight from your conversation that you believe is important for us to collectively hold as an organization as we move into the next phase of work?