Designing Meetings that Matter: Purpose, Impact, and Engagement

February 2025

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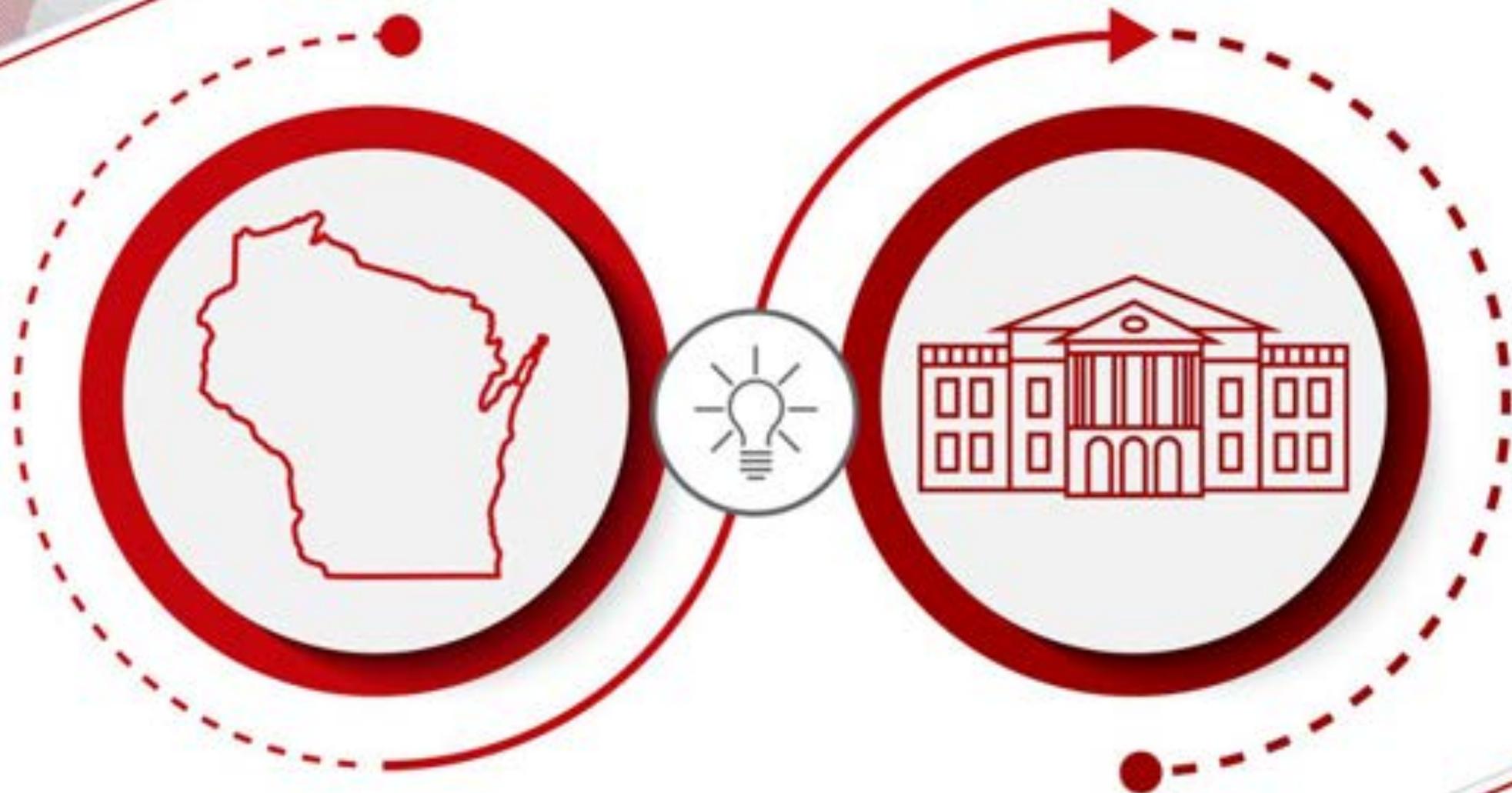DIVISION OF EXTENSION
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The Wisconsin Idea

Extension embodies the Wisconsin Idea by partnering to develop and connect the research and educational resources of UW–Madison with residents and communities to address local, statewide, and national issues

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Connecting Communities and Campus

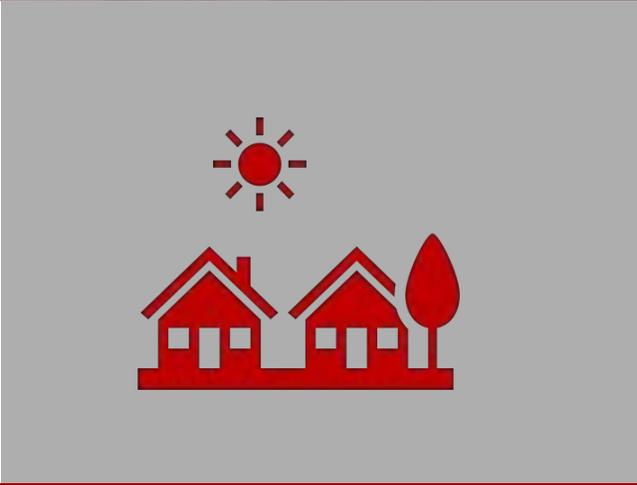Practical solutions, bi-directional research, addressing latest needs and concerns
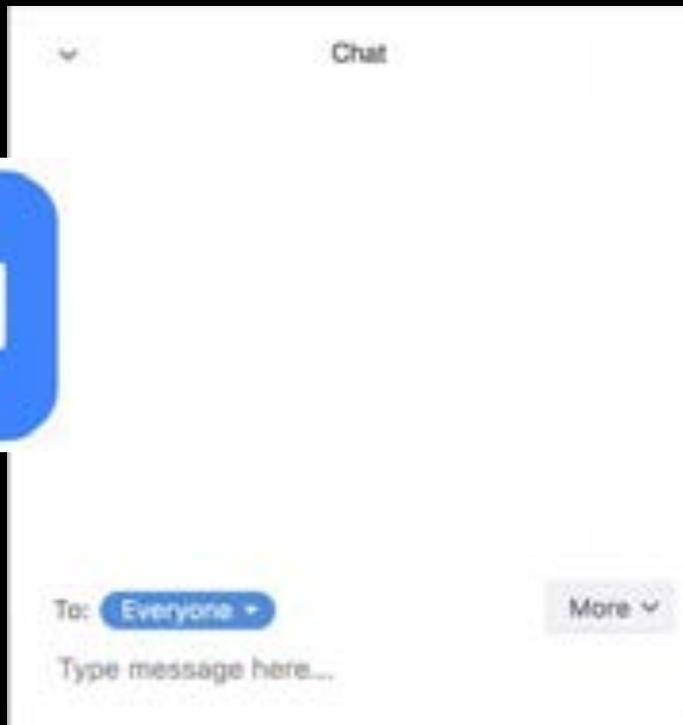
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Developing engaged community members, effective community leadership, and healthy nonprofit and community organizations for the good of Wisconsin communities.

What is one problem or challenge you frequently have in your team meetings?

What can you expect to learn?

- **Determine** when a meeting is necessary and identify the right participants.

- **Clarify** the meeting purpose and design engagement strategies that align with desired outcomes.

- **Understand** how group dynamics can inform engagement strategies.

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When? and Who?

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What is one reason to have a meeting? (use one word or short phrase)

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Ten (10) Reasons to Have a Meeting

1. Make a decision that requires multiple perspectives

2. Build shared understanding

3. Align on priorities or direction

4. Generate ideas or solutions

5. Coordinate work across people or units

6. Strengthen relationships and trust

7. Address tension, misalignment, or conflict

8. Engage people in a change process

9. Navigate complex or ambiguous issues

10. Support learning or capacity building

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Reasons NOT to meet!

1. Purpose isn't clear

2. Desired outcome can be achieved without a meeting

3. Decision needs only one or two people

4. You are looking for accountability rather than collaboration

5. Key people aren't available

6. There is no plan for engagement

7. Meeting is just a habit

8. People are already overloaded

What is one criteria you use to determine who to invite to your meetings? (use one word or a short phrase)

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Who: Start with Meeting Goals

Attendees should be selected *in service of those goals.*

Ask:

1. What are the goals of your meeting?

2. Who can help you accomplish these meeting goals?

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Who: Role and Purpose

Only invite individuals who directly contribute to the meeting's purpose, outcomes, or decisions.

Ask:

1. Who is *responsible* for carrying out resulting tasks?
2. Who has *authority* to make or approve decisions?
3. Who has *expertise* essential to the conversation?
4. Who will be *impacted* by the decision?

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Topic, Outcome, Process (TOP) Model

- A design framework for structuring meetings around purpose and outcomes rather than just agenda items.

Topic, Outcome, Process (TOP) Model

Scenario 1: Academic Program Revision

Topic: Review proposed changes to the undergraduate major requirements in the department.

Outcomes:

- Shared understanding of the proposed revisions.
- Agreement on which changes are ready to move forward and which require further exploration.
- Identification of any missing stakeholders (e.g., advising, accreditation, assessment).

What would your process look like?

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Scenario 1: Academic Program Revision

Process:

- **Context setting:** Presenter gives a concise overview of proposed changes.
- **Clarifying questions:** Round of brief, structured Q&A.
- **Small-group discussion:** In groups, faculty review specific sections and identify areas of alignment or tension.
- **Full-group synthesis:** Each group reports out; facilitator maps areas of consensus vs. divergence.
- **Decision clarification:** Facilitator names decisions made and next steps.

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Scenario 2: Cross-Unit Collaboration

Topic: Launch a multi-office collaboration (Advising, Housing, Student Affairs, Registrar) to improve retention for first-year students.

Outcomes:

- Clear shared purpose for the initiative.
- Identification of 2–3 priority focus areas for the first phase.
- Agreement on how the units will collaborate and communicate.

What would your process look like?

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Scenario 2: Cross-Unit Collaboration

Process:

- **Opening reflection:** Participants share what success would look like from their unit's perspective.
- **Purpose alignment:** Facilitator leads a purpose-statement co-creation activity.
- **Idea generation:** Silent brainwriting → small group clustering of themes.
- **Prioritization:** Dot voting on top focus areas.
- **Collaboration planning:** Create a simple working agreement (communication, decision-making, roles).

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Scenario 3: Administrative Staff Meeting

Topic: Review and improve the workflow for processing graduate student appointments at the start of each semester.

Outcomes:

- Identification of current pain points in the workflow.
- Agreement on changes to the process for the upcoming term.
- Identification of what must be communicated to departments and when.

What would your process look like?

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Scenario 3: Administrative Staff Meeting

Process:

- **Process mapping:** Staff map the current workflow step-by-step.
- **Pain point identification:** Individuals place sticky notes or comments on bottlenecks or confusion points.
- **Solution brainstorming:** Small groups generate options.
- **Decision-making:** Evaluate proposed changes against criteria (feasibility, timeline, impact).
- **Communication planning:** Draft key messages and deadlines for departments.

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Topic, Outcome, Process (TOP) Model

TOPIC — What is the meeting about?

OUTCOME — What will we achieve?

PROCESS — How will we engage?

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TOPIC: What is this meeting about?

- What is the core issue, opportunity, or question this meeting exists to address?

- What is driving the need for this meeting now? Why not earlier? Why not later?

- What context do we need to understand this topic well?

- Is this topic actually several topics in disguise? If so, what belongs in this meeting — and what does not?

- If I asked everyone what they think the meeting is about, would they give the same answer?

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OUTCOME: What must be different because we met?

- Finish the sentence: "By the end of this meeting we will..."

- Which type of outcome is needed: alignment, decision, brainstormed possibilities, share understanding, something else?

- If this meeting is successful, what tangible evidence would I see 24 hours later? Two weeks later?

- What outcomes are out of scope for this meeting – even if someone brings them up?

- If we can achieve only ONE outcome, which one matters most and why?

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PROCESS: How will we engage to get there?

- What sequence of activities best supports the outcome? What does the group need first: clarity, ideas, perspectives, data, trust, something else?

- What support does the group need?

- What engagement ensures all voices are included?

- What methods serve the outcome: small groups, pair work, silent brainstorming, voting, mapping, something else?

- What level of decision authority exists? Who actually decides?

- What process risks exist (power dynamics, dominance, confusion, conflict, disengagement)? How will I pre-empt them?

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Share a 'light bulb' moment from your reflection.
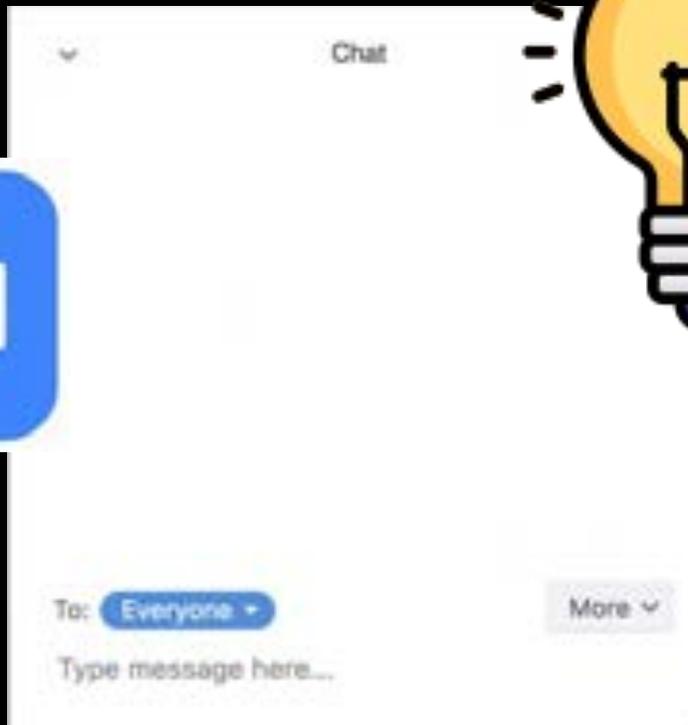
Key Takeaway: Productive and engaging meetings are ones in which we are clear about what we need to discuss/do (topic), the results we want to see come from the meeting (outcomes), and the ways we will engage meeting participants (process).

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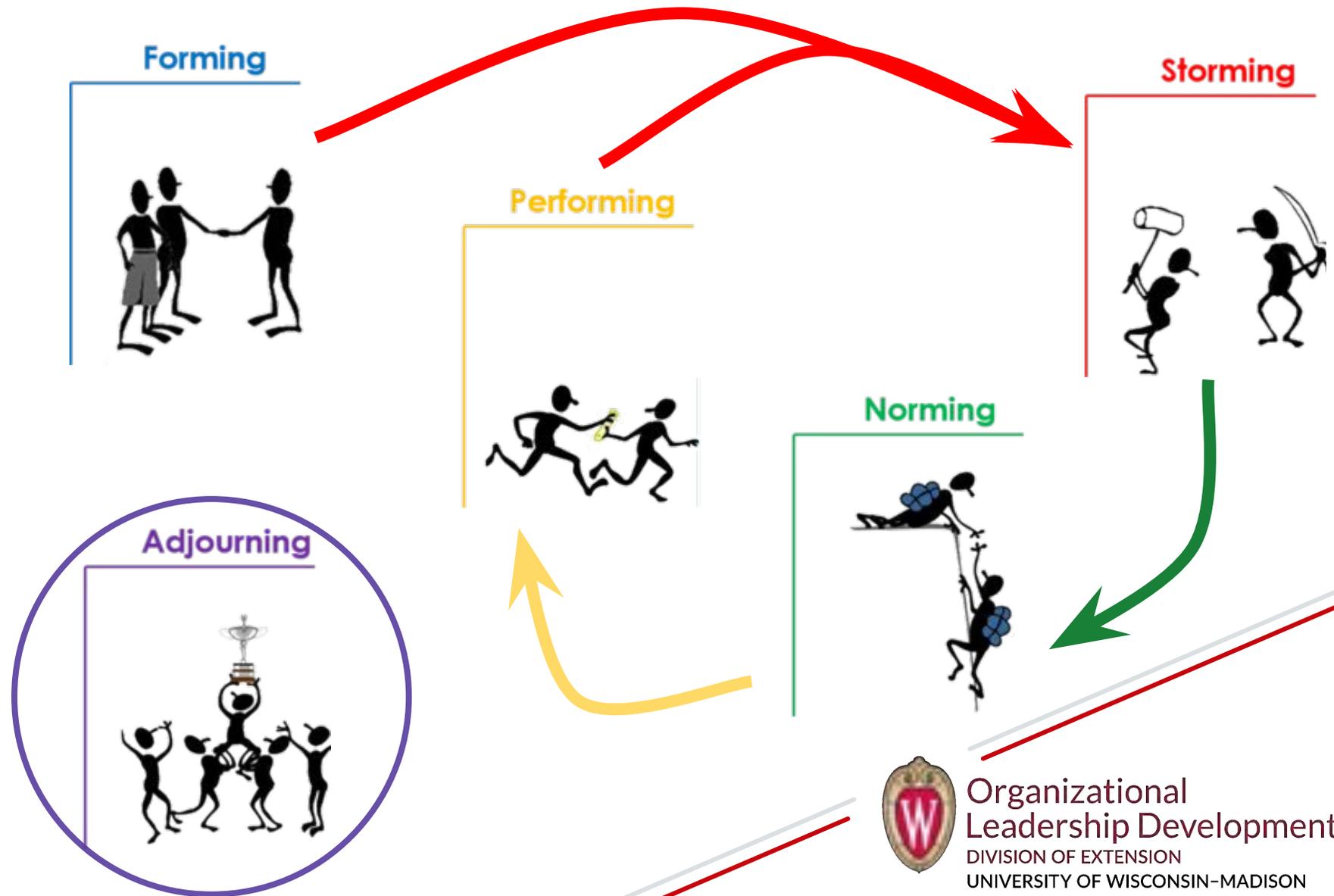# Tuckman's Stages of Group Development

- A developmental framework for understanding how groups evolve and how that impacts facilitation.

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Tuckman's Stages of Group Development

Five Stages:

- forming
- storming
- norming
- performing
- adjourning

Forming

Storming

Performing

Norming

Adjourning

Direct Application

▷ **Think about groups you work with...**

▷ **Where are they in Tuckman's Stages of Group Development?**

▷ **What engagement actions would support them?**

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Forming:

- Looks like: excitement and anxiety

- Engagement actions: clarify expectations, mission, and group norms
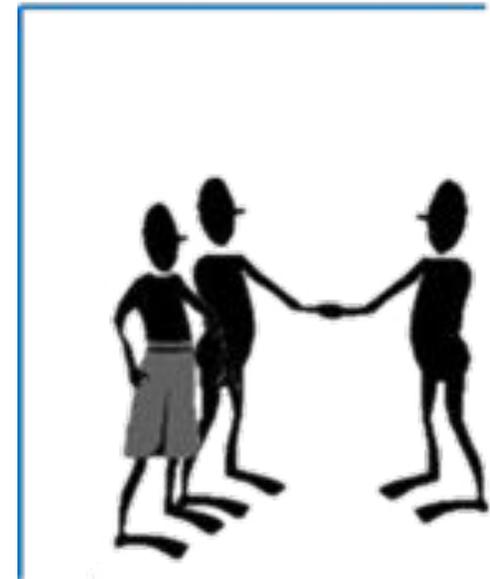
What about your groups?

Forming

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Storming:

- Looks like: defensiveness and competitiveness

- Engagement actions: encourage participation, promote respect, and focus on mission

What about your groups?

Storming

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Norming:

- Looks like: acceptance and trust

- Engagement actions: implement problem-solving processes and reinforce belonging and team spirit

What about your groups?

Norming

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Performing:

- Looks like: motivation and synergy

- Engagement actions: celebrate milestones, support productive conflict, and share responsibilities

What about your groups?

Performing

Adjourning:

Adjourning

- Looks like: satisfaction, sadness, and uncertainty

- Engagement actions: complete deliverables, capture best practices, and celebrate success

What about your groups?

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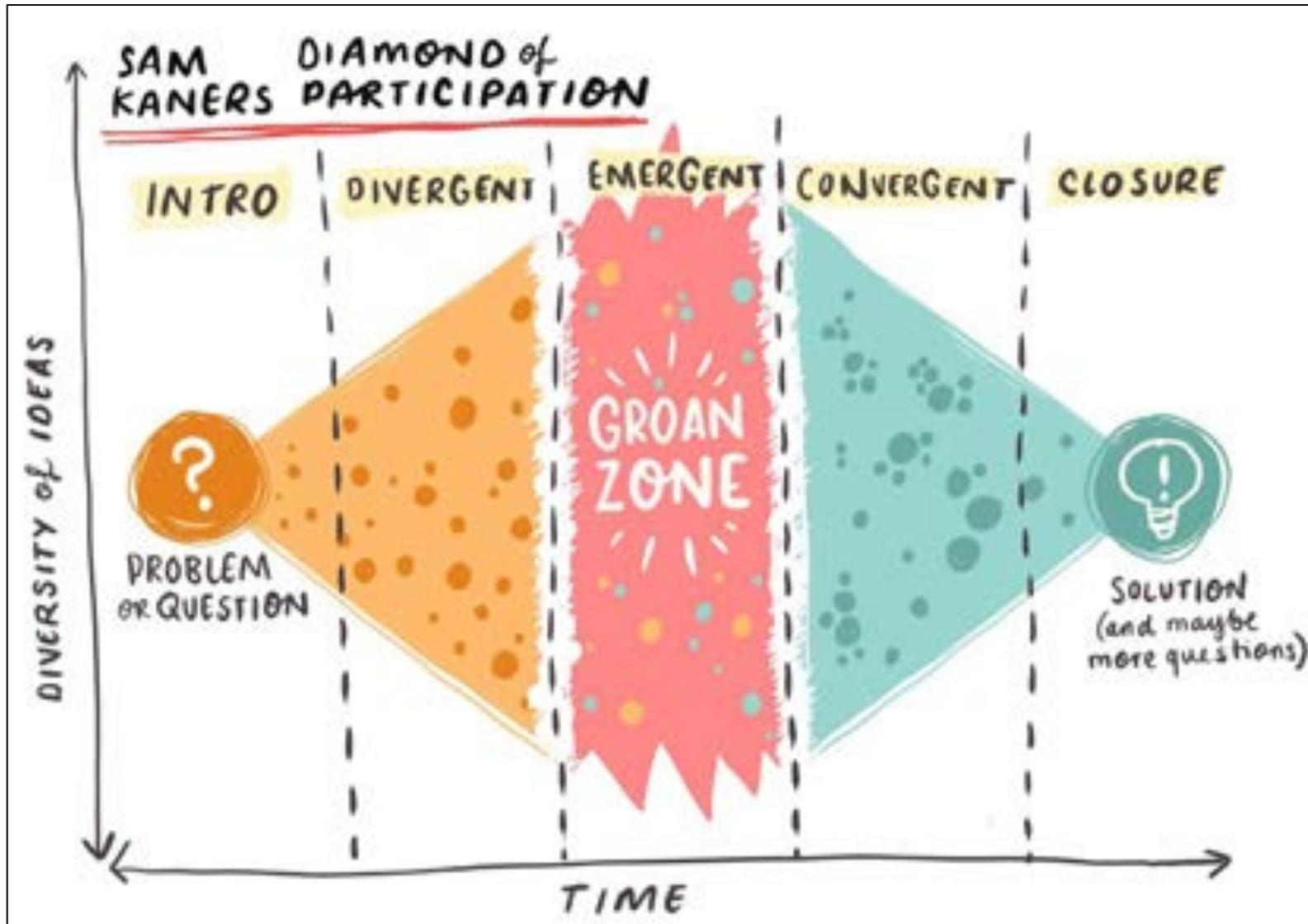
Share a 'light bulb' moment from your reflection.

- A decision-making framework that explains the natural phases in groups discussions and how to navigate them.

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Diamond of Participatory Decision-Making

SAM KANERS DIAMOND of PARTICIPATION

INTRO | DIVERGENT | EMERGENT | CONVERGENT | CLOSURE

DIVERSITY of IDEAS

PROBLEM or QUESTION

GROAN ZONE

SOLUTION (and maybe more questions)

TIME

Five Phases:

- intro
- divergent
- groan zone!
- convergent
- closure

Visual Representation Source: Tash Willcocks, Head of Learning Design @TPXImpact

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Direct Application

▷ **Think about groups you work with…**

▷ **Where are they in Diamond of Participatory Decision Making?**

▷ **What engagement actions would support them?**

Intro:

- Looks like: lack of clarity, jumping to quick solutions

- Engagement actions: set expectations, norm-setting, invite curiosity
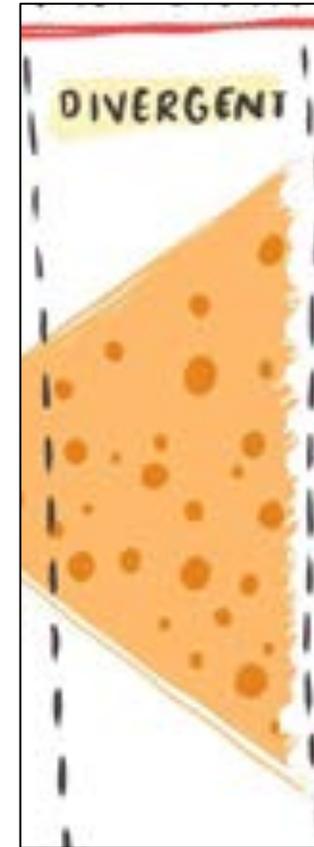

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Divergent Zone:

- Looks like: lots of ideas, creativity, exploration, range of viewpoints

- Engagement actions: brainwriting, open-ended questions, encourage quantity over quality

What about your groups?

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Groan Zone:

- Looks like: ideas collide, contradictions, frustration, overload

- Engagement actions: reframing, active listening, visual synthesis, normalize ambiguity
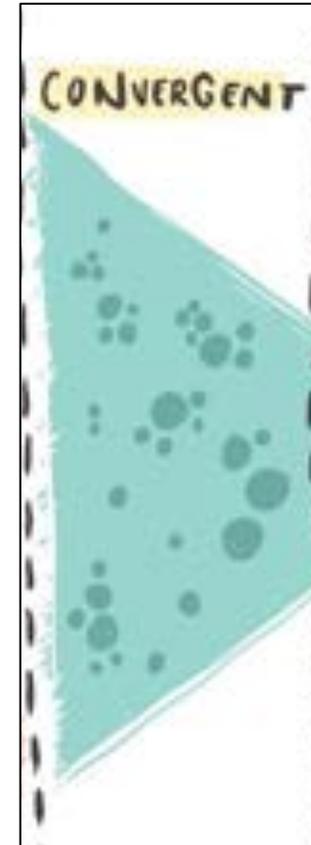

What about your groups?

Convergent Zone:

- Looks like: noticing connections, themes emerge, clarity

- Engagement actions: criteria setting, idea evaluation, test emerging agreements

CONVERGENT

What about your groups?

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Testing for Consensus

1 finger:
I don't agree, and I'll block it

2 fingers:
I don't agree, but I'll work for it

3 fingers:
I'm neutral

4 fingers:
It's a good idea, I'll work for it

5 fingers:
It's a great idea, I'll lead

Designed by **Vecteezy**

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Diamond of Participatory Decision-Making

Closure:

- Looks like: share understanding, final decisions/agreements, clarity

- Engagement actions: summarize decisions, assign roles/task, reflection, wrap-up

CLOSURE

SOLUTION
(and maybe more questions)

What about your groups?

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Share a 'light bulb' moment from your reflection.

Key Takeaway: Knowing where a group is at in their development, or in a decision-making process, can help us get clear about what we need to do in our next meeting to engage the group and move them forward.

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Resources

Books:

- Facilitator's Guide to Participatory Decision-Making, Sam Kaner, et al.
- Don't Just Do Something, Stand There! Ten Principles for Leading Meetings that Matter, Marvin Weisbord and Sandra Janoff
- The Art of Gathering: How We Meet and Why It Matters, Priya Parker
- Death by Meeting: A Leadership Fable...About Solving the Most Painful Problem in Business, Patrick Lencioni

Online:

- Virtual Meeting Guide, Priya Parker – https://www.priyaparker.com/the-virtual-gathering-guide
- How to choose meeting attendees and assign them roles, Robert Mitson – https://www.sherpany.com/en/resources/executive-meetings/how-to-assign-meeting-participants/
- Facilitation Techniques, UNC – https://operationalexcellence.unc.edu/facilitation-techniques/
  - On this page: dot voting, impact/feasibility, parking lot
- Meeting Efficiency Tips, UNC – https://operationalexcellence.unc.edu/meeting-efficiency-tips/
- Four tips for leading online meetings, UMN Extension – https://extension.umn.edu/learn-about/four-tips-leading-online-meetings

Resources

Online *continued*:

- Leading engaging meetings, UMN Extension – https://extension.umn.edu/mental-wellbeing/leading-engaging-meetings#conduct-regular-pulse-checks-with-teams-2689769
- Criterion Grid (for assessing ideas) – https://sahc.umn.edu/sites/sahc.umn.edu/files/2024-10/tool_-_criterion_grid.pdf
- Create working agreements for productive discussion, UMN Extension – https://extension.umn.edu/public-engagement-strategies/create-working-agreements-productive-discussions
- Planning an effective meeting agenda, UMN Extension – https://extension.umn.edu/leadership-development/planning-effective-meeting-agenda
- 43 brainstorming techniques and games for creating new ideas, SessionLab – https://www.sessionlab.com/blog/brainstorming-techniques/
- Liberating Structures – https://www.liberatingstructures.com/ls/ Various tools including:
  - What, So What, Now What – https://www.liberatingstructures.com/9-what-so-what-now-what-w/
  - 1-2-4-All – https://www.liberatingstructures.com/1-1-2-4-all/
  - Agreement & Certainty Matrix – https://www.liberatingstructures.com/27-agreement-certainty-matrix/

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