



Atma Partnership Meeting

Atma PM sets the agenda prior to the meeting and does any pre-meeting coordination for preparation

Day before/ week of:

- Pre-meeting email, call, or text (as per the preference of partner participants) to remind and confirm

Day of meeting:

- Pre-morning SMSing to reconfirm, give directions, etc. (as needed)
- Printing out documents: agenda, worksheets, etc.
- If not printing agenda, write clearly on whiteboard for all to see. Include time frames for each segment/topic.

During meeting:

1. Facilitate chit chat
2. Introductions if appropriate
3. Prepare white board and hand outs
4. Call the meeting to order
5. Outline the purpose of the meeting
 - a. Who: we (Atma) and the partner
 - b. What: Goals for the meeting
 - c. How: Agenda – process to achieve goals/lead discussion
 - d. Why:
 - i. Professional: Perspective in the long term partnership and strategy.
 - ii. Personal excitements/positive affirmations (e.g. all of you really care about this, not going to be easy to reach consensus but we are all here for that reason)
6. Discuss Items planned on. Maintain attention to the time; if anyone goes on a tangent or starts focusing on one detail over others, gently guide them back to the main topic and objective
7. Try to ensure that each item has a specific outcome/ next step.

Closing the meeting:

8. Summarize what we did in the meeting
9. Summarize the action points
 - a. Who will do what and when
10. Conclude with a positive – great work and we are looking at being a part of your growth!
 - a. Summarise good points, e.g.:
 - b. Worked well as a team
 - c. Moved through the problem solving process together
 - d. Hard work ahead, but if we get this achieved then it will have such an impact on students
11. Have people share their excitements

Atma Language:

- “Atma is really excited to be working with ___” – seeing the benefits of the partnership
- Discuss Atma has helped past partners to do this
- Atma volunteers are a big part of this and we are happy we could provide this to you as part of our service
- Probing questioning
 - o If you want to do this, can include:
 - What are the processes that need to take place
 - Who are the people that will need to be involved
 - What would the timeline be
- Re-statement of what they have said – clarify and formalize into an action point

Atma Role:

- a. Atma Portfolio Manager needs to be the facilitator in charge of the meeting
- b. Position ourselves as the person moving us through the agenda and making sure everyone is heard
- c. Facilitating consensus
- d. Everyone should feel confident that Atma is leading the meeting and that the outcome will be achieved
- e. Act as neutral third –party/ Switzerland
- f. Time keeper
- g. Change approach if things are getting intense
- h. Set policies for how decision-making is made

Communicated Meeting Materials:

These should be sent over email within one day before and after the meeting:

Pre meeting:

- Date for the meeting
- Location
- Requested Attendees
- Optional Attendees
- Agenda
- Action Points to prepare for meeting
- Person, task, timeline

Post meeting:

- Date for the meeting
- Location
- Attendees
- Agenda Notes- Fill in with brief overview of items discussed
- Action Points going forward (before next meeting)
- Person, task, timeline
- Any additional follow-up items or supplementary materials