

Preliminary Meeting (First Meeting)

Purpose of Preliminary Meeting

- Getting to know your Mentor/Mentee
- Establish a meeting/communication plan for the rest of the academic year
- Helping Mentor/Mentee decide if they want to continue in PA-ACCEL Mentorship Program

Who contacts who first?

- Student-Mentees are responsible for reaching out to their Mentors first via email by September 29th.
- Student-Mentees will introduce themselves and schedule a preliminary meeting with their Mentor.
- This meeting may be over the phone, over video conference, or in-person.

[*Click here for tips and templates on Email Etiquette](#)

Note to Mentors: If you do not hear from your student-mentee by September 29th (or within two weeks after receiving your match), please email your student-mentee. If you do not receive a response after reaching out, please email PA Action Coalition Senior Manager, Zaharaa Davood at zadavood@phmc.org or PA Action Coalition Coordinator, Namaijah Faison at nfaison@phmc.org.

What to do **BEFORE** Preliminary Meeting –

- a. Mentors and Mentees: Create a “Culture Box” before meeting** – The purpose of creating a ‘Culture Box’ is as follows.
 - To facilitate personal and cultural self-awareness through critical self-reflection.
 - To help participants become better acquainted with each other.
 - To give participants the tools to look beyond stereotypes and engage in meaningful sharing of experiences and values.

“If you do not define yourself, others will do it for you.”

WHAT TO DO:

- a. Think of two or three items representing essential parts of who you are, your cultural identity (whatever that means to you), values, and beliefs. (It could be anything. So long as it holds significance/value to you and your experience. It could be pictures when the object is too big or inaccessible, quotes, trinkets, poems, songs, verses, Religious artifacts, quilts, etc.).
- b. During your meeting you (mentor/mentee) will describe what you brought, why, and what it means to you. What value does it hold? Think about the journey you are about to embark on and how you want your mentor/mentee to walk/work with you on this journey.
- c. The discussion is more than the surface meaning of the items. **What to discuss about the content of the “Culture Box”:**
 - What did you bring (what is in your culture box?)

- Why did you bring it? (Why is it important to add this to your culture box?)
 - What is the significance of the item to you?
 - Why does the item(s) in the culture box hold particular significance for you, and why?
 - What is the significance of an item(s) in your culture box?
- b. Mentors and Mentees:** Review the Mentor-Mentee Toolkit to prep/navigate the mentoring relationship – especially the [Preparing for Mentoring Relationship](#) section to prep before the first meeting.
- c. Mentors please watch the** [virtual mentor training conducted by Dr. Roberta Waite](#) that covers topics such as: unconscious bias, navigating mentor/mentee relationships, leadership styles, etc. Also review other resources listed below.
- d. Helpful Tools for Mentors:**
- a. To help create your Meeting/Communication plan: [Mentor and Mentee Reflection Questions worksheet](#)
 - b. To help assess how the mentoring relationship is working: [Mentoring Partnership Accountability Tool](#)
 - c. Short activities to use at the beginning of a check-in: [Connecting Through Conversations: Short Activities for Mentors](#)
- e. Helpful Tools for Students:**
- a. Tips and templates to email mentor: [Establishing Good Communication With Your Mentor - Tips and Templates](#)
 - b. To help create your Meeting/Communication plan: [Mentor and Mentee Reflection Questions worksheet](#)
 - c. To help assess how the mentoring relationship is working: [Mentoring Partnership Accountability Tool](#)

Additional resources from PA-ACCEL website:

<https://www.paactioncoalition.org/about/pa-accel-mentorship-program.html>

Tools for Mentors and Students:

- > [Tips & Templates Establishing Good Communication \(Emails, etc.\) with Faculty & Mentors](#)
- > [Preparing for First Meeting: Mentor and Student Mentee Reflection Questions](#)
- > [Preliminary Meeting - Details](#)
- > [Connecting Through Conversations: Short Activities for Mentors \(Check-Ins\)](#)
- > [Mentoring Partnership Accountability Tool](#)
- > [Pennsylvania Action Coalition: Mentor Training Sessions led by Dr. Roberta Waite EdD, PMHCNS, ANEF, FAAN](#)
- > [Closing the Mentoring Relationship](#)

Post-Graduation Plan:

- > [SMART Goals](#)
- > [Post-Graduation Plan Worksheet](#)

What to do **DURING** Preliminary Meeting –

Discuss the following:

1. **Culture Box Activity (directions above)**
2. Share preferred method of contact (email, phone)
3. Best time to contact
4. Set expectation/goals
5. How often to meet (We suggest meeting at least once a month)
6. The mentor and mentee are responsible to establish a Meeting/Communication plan for the entirety of the academic year during your first meeting. This meeting may be over the phone, over video conference, or in-person. We encourage you to find a mutually agreed upon method.

Make sure you are prepared to create—during your initial conversation—an agreement about how the mentoring partnership will work. Both the mentor and the student-mentee should reflect on the questions to ponder so that they can create an agreement that meets both their needs. Additional helpful questions can be found in the [Mentor and Mentee Reflection Questions worksheet](#)