Box 4. Getting started - Initial meetings (Some practical process recommendations that may be useful)

This is the period during which the supervisor considers their own suitability for the study and for the student, and will explore options for co-supervision (if this is required). Thus, it is a two-way process about finding the “right” supervisor and actually being the “right” supervisor.

- If the student is not known to a potential supervisor it is useful to ask for a short overview or concept paper in which they can give some indication of their thinking and how they conceptualise their study (keeping in mind that in some contexts students may be “given” a research topic as a result of a research grant and/or joining an existing project).
  - Developing a short concept paper not only requires them to concretise their thoughts, but also enables the supervisor to get a sense of whether or not the planned study will fall in their field of expertise.
  - It also provides some indication of the student’s scientific writing skills
  - Requesting examples of some of the student’s earlier work, for example a Master’s dissertation or previous publications, can also be valuable in determining a student’s prior experience and potential for doctoral studies.

- If the supervisor feels there is the potential for a good “fit,” this is the time for an initial face-to-face (or teleconference) meeting.
  - At this point, the supervisor needs to keep in mind that in the same way that they are wanting to find out about the prospective student and their potential, the student may also use these initial interactions to determine whether they will be able to work with the supervisor.
  - Prospective students can often come across as being uncertain and hesitant at this stage and the skilful supervisor will be the one who can encourage meaningful dialogue.
  - During this first meeting, it is important for the supervisor to state expectations clearly and tell the student that they are in the process of trying to make the best possible choice for their doctoral journey and that they should feel comfortable about talking to other possible supervisors should they wish.

- Once there is agreement in principle about supervision, a more formal conversation is usually warranted. Ideally, at this session, the supervisor and the student discuss their expectations for the relationship and jointly establish the “rules of the game”. Expectations most often relate to issues around communication such as:
  - how often should meetings take place?
  - who sets up the meeting?
  - what should be prepared prior to a meeting?
  - how are the meetings recorded?

Written documentation of discussions, and a memorandum of agreement can be valuable—either formal (the academic institution may have templates available) or informal (e.g. an email record of the meeting outcomes)

- It is not uncommon for supervisors and/or students to initially be comfortable with the choices made only to find that after a period of working together the relationship is in fact not working.
  - While the proposal is being developed, the study can shift quite substantially from what was initially planned and can move away from the supervisor’s direct area of expertise.
  - People can simply be incompatible.
  - Different academic institutions will have form a land varied requirements; the appointment of the supervisor be ratified by, for example, a postgraduate committee. It can happen that this committee feels that the person approached to fulfil the supervisory role is not the right the person because of a lack of expertise in the particular field, insufficient supervisory experience, or because the identified potential supervisor already has too many doctoral candidates.
  - The supervisory relationship ought to be ‘customised’. It should be formed by those in the relationship based on the unique needs and contexts of these role-players at that particular point in time.