FIRST MEETINGS CHECKLIST FOR DOCTORAL STUDENT AND SUPERVISOR(S)

- Meetings and Communication
    - Importance of open communication / Preferred communication medium and style
    - Importance of regular meetings / Preferred frequency, expectations, format for meetings
    - Student's preferred way of being supervised / Supervisor's preferred way of supervising
    - Student's expectations of the supervisor / Supervisor's expectations of the student
    - Supervisory Committee (annual meetings) / Process for selecting committee members

- [Culture of Care](), [Emergency Info and Procedures](), [ASOB Health & Safety]()
    - Review and understand responsibilities

- Professional Conduct as an Academic / Culture within the Department
    - Culture of the PhD program / Business PhD programs in North America
        - e.g., work ethics, collegiality, etc.
    - Attending departmental seminars / functions
    - Conferences / PhD Consortiums / Workshops
    - Other professional development opportunities and requirements
    - Funding opportunities / expectations
        - Grant and scholarship application expectations
        - Funds for conferences
        - Discuss whether funding is tied to specific projects / topics

- Courses
    - Number and types of courses required (e.g., Major Area, Methods, Cognate Minor)
    - Recommendations for, and approval of, courses
    - Expectations when taking courses

- Conducting Research
    - Research interests and future plans for both student and supervisor
        - Research assistantship
        - Individual projects
    - Expectations for summer projects
    - Collaborating with other scholars / Visiting other universities
    - Required resources (e.g. software licences; access to U of A resources i.e. WRDS, Qualtrics, etc.)

- Road Map and Timing of Key Milestones in the PhD Program
    - Course work (1st and 2nd year)
    - 1st / 2nd year paper (if one exists)
    - Professional Development requirement (IDP in 18 months, 8 hrs before end of 3rd year)
    - Comprehensive Exams (2nd year)
    - Ethics requirement (8 hrs before end of 1st term)
    - Teaching (3rd and/or 4th year) and Teaching Preparation (Option A or B)
    - Candidacy Exam (before the end of 3rd year)
    - Thesis research
    - Expectations for successful completion of program (e.g., journal submissions, job market)

We confirm that the above matters have been discussed:

_____   _____   _____

Name of the PhD Student   Signature   Date

_____   _____   _____

Name of the Supervisor   Signature   Date